



# **Training Manual on *mSupply* for Healthcare Professionals**

Legacy mSupply Trainer's Guide

MEBS Global Reach

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# LEGACY LEVEL 1



## Course Overview: Desktop User Level 1

At the end of this course, you will be able to:

1. Describe basic mSupply functions
2. Log into mSupply and navigate the main screens
3. Order and receive stock from another store using mSupply

### Course Structure

This course is organized into the following sessions:

<b>S/N</b>	<b>Session Title</b>	<b>Time Allotted</b>
1	Logging in	30 minutes
2	Changing Users	30 minutes
3	Switching stores	20 minutes
4	Key Definition	40 minutes
5	Navigation Tab	30 minutes
6	Learning check – Basic Function	10 minutes
7	Viewing current stock on Hand	20 minutes
8	Internal Orders - General	30 minutes
9	Internal order - Program	35 minutes
10	Supplier Invoice	40 minutes
11	Internet Connectivity	20 minutes
12	Knowledge Check	10 minutes

## Session 1.1: Logging in

### Objectives:

By the end of this session, the participants should be able to:

1. Confidently log in to Open mSupply.
2. Select the correct user account, password, and store.
3. Verify their login details before beginning activities on the platform.

Time: 15 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Introduction to Logging In	Lecturette	5 minutes
2.	Login Steps	Demonstration/Guided Practice	10 minutes

### Activity 1: Introduction to Logging In

**Step 1:** Welcome participants to this session and inform them they will learn how to confidently login to the mSupply to carry out any and different activities on the platform.

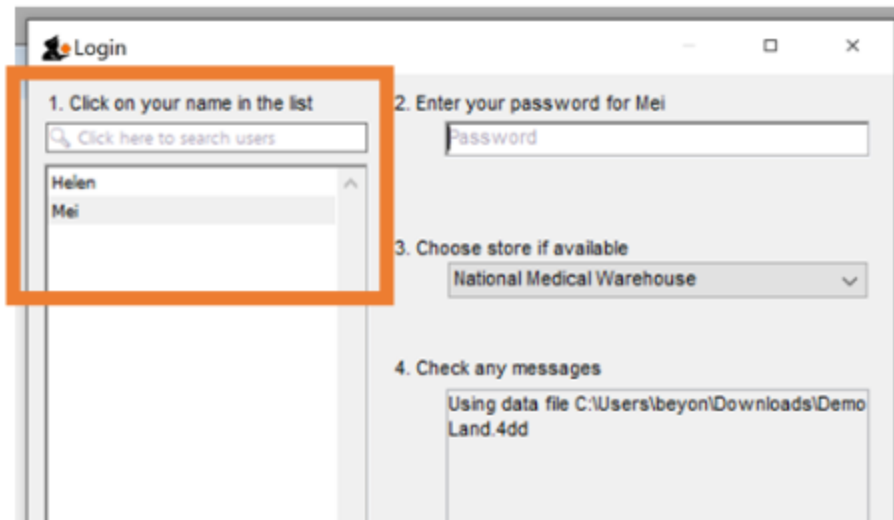
### Activity 2: Login Steps

**Step 2:** Provide the Link to all participants and ask them to click on it to continue.

**Step 3:** Inform participants that the first thing they will see when they open mSupply is the **Login** screen.

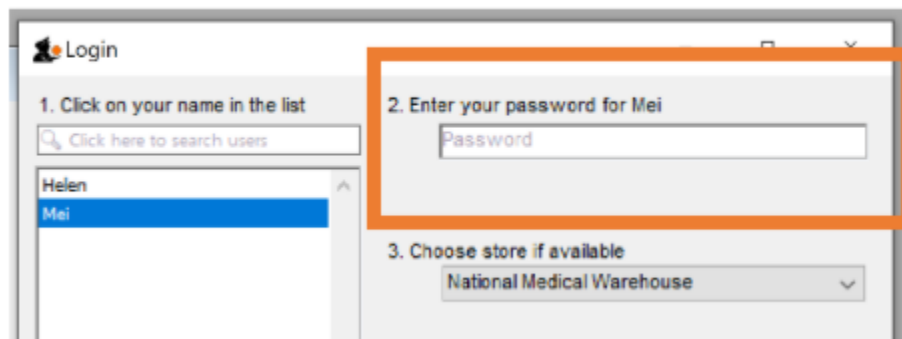
**Step 4:** Ask participants if they can see the space for selecting their name?

(Move around the class and be sure everyone is on the login page)



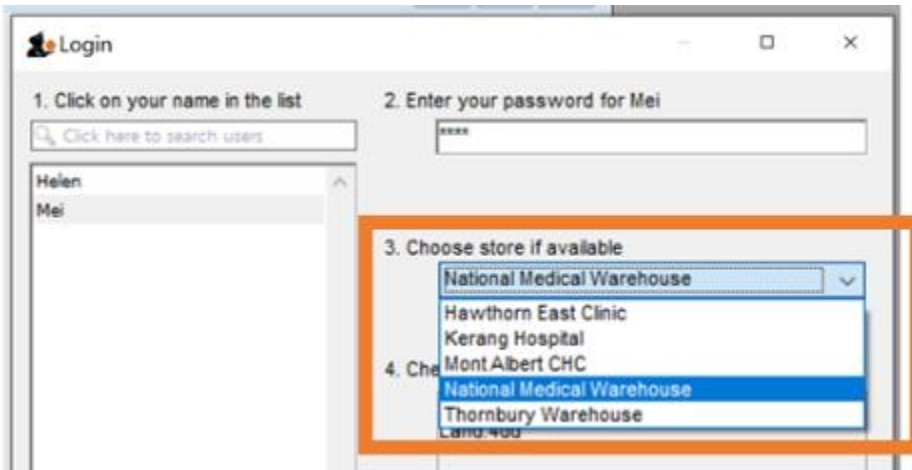
**Step 5:** Inform participants that if a person has been registered, their name will be on the list, and they just have to select or search their name through the search bar.

- Enter your password.  
(each person that is registered is provided with a password)

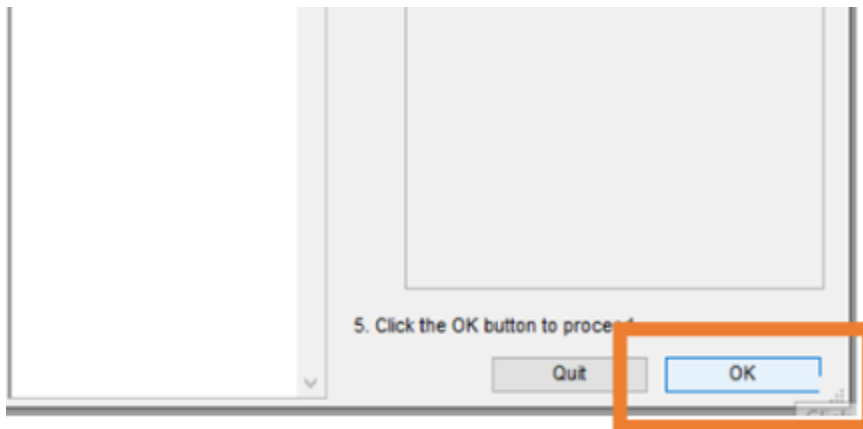


**Step 6:** Ask participants to select the store where they intend to carry out an activity.

**Step 7:** Tell participants to confirm they are in the right place.



- Click on the OK button to proceed.



**Step 8:** Ask participants to verify they are logged in correctly with their details by looking at the bottom left corner of the screen.



**Step 9:** Ask if all participants can repeat this process on their own before proceeding to the next session.

## Session 1.2: Changing Users

### Objectives:

By the end of this session, the participants should be able to:

1. Switch users correctly in Open mSupply.
2. Ensure that every activity is traceable to the correct user for accountability and auditing.
3. Verify that the correct user is logged in.

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Introduction- Purpose of a “User”	Lecturette	5 minutes
2.	Steps to Change User	Demonstration/Hands-on-Practice	10 minutes

### Activity 1: Introduction- Purpose of a “User”

**Step 1:** Explain to participants that, for accountability and auditing, every activity on the mSupply is traceable to a user, so every time someone else wants to work on the mSupply, be sure to switch user from you to the person. So if you are logged in and a colleague wants to do something on the mSupply make sure to use the procedure you are to learn now- switch user and allow them enter their password.

Note: Pause to take questions from participants on this point.

### Activity 2: Steps to Change User

**Step 2:** Call on a volunteer from the participants, one at a time to read out each step in this unit from their trainers guide-

1. Go to **file** and click **change user...**
2. Select the name of the new user, in this case it is Helen...
3. Helen will then enter her password
4. Select the store you want to work in and
5. Click **Ok**

**Step 3:** Remind the participants how to verify the new user by looking at the bottom left corner of the screen. They should all confirm that they can do this with ease.

## Session 1.3: Switching Stores

### Objectives:

By the end of this Unit, the participants should be able to:

1. Explain what a “store” is in Open mSupply.
2. Switch from one store to another correctly.

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Introduction – What is a Store?	Lecturette	5 minutes
2.	Switching Between Stores	Demonstration/Hands-on-Practice	10 minutes

### Activity 1: Introduction – What is a Store?

**Step 1:** Explain what a store is to the participants.

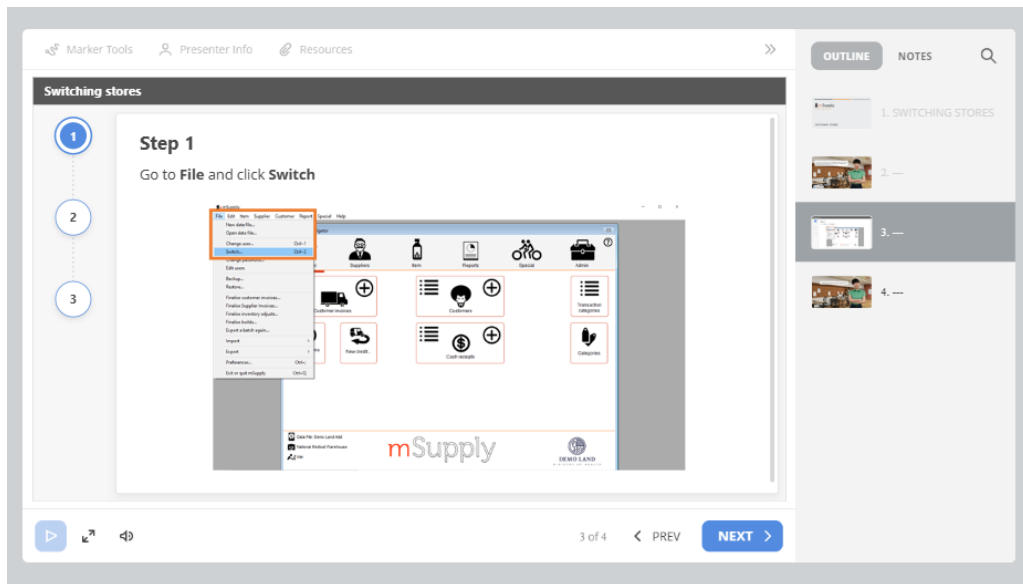
Hint: Any entity that is using the mSupply, some entities can run multiple store at the same time, for example, within a hospital, Emergency Department Pharmacy might manage stock completely separately from the main Pharmacy. This would mean two different stores.

- You may want to confirm participants understand the explanation before you proceed

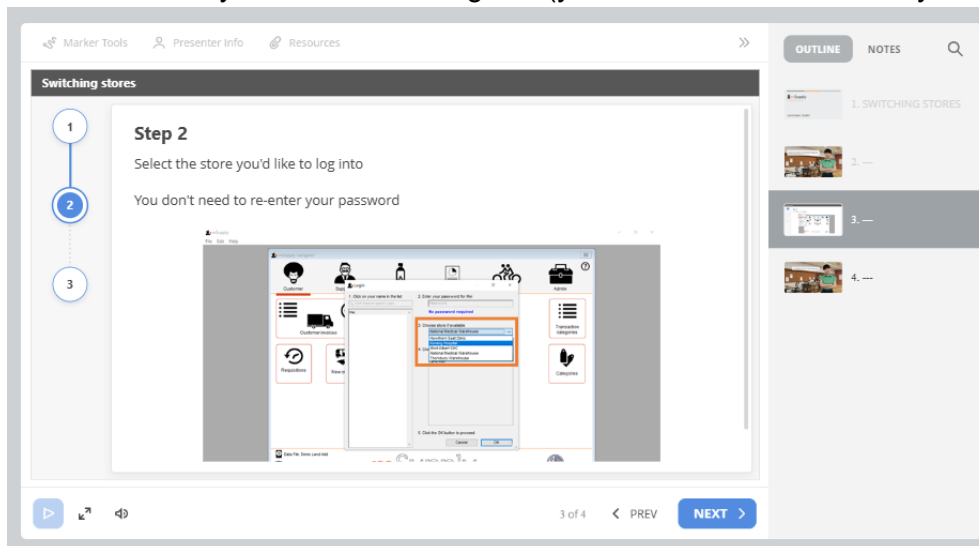
### Activity 2: Switching Between Stores

**Step 2:** Ask volunteers from the participants, one at a time to read the steps as shown in their guide-

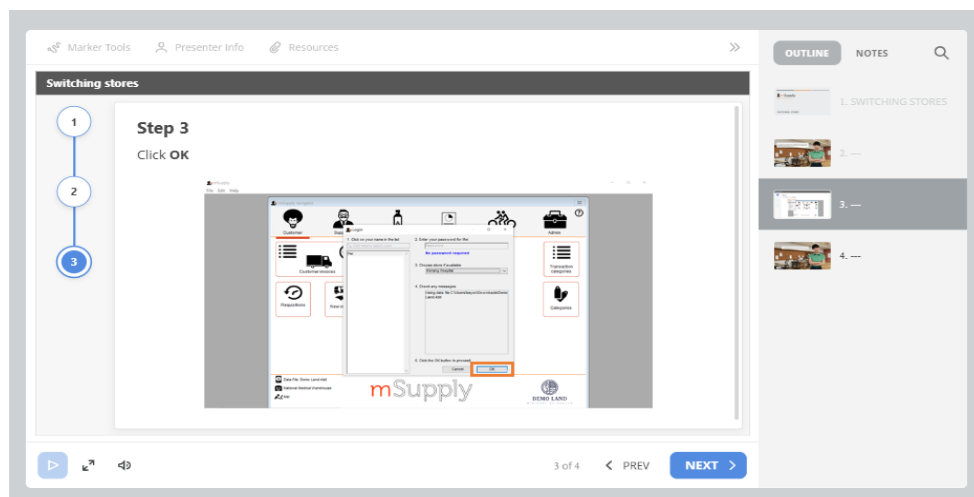
1. Go to **File** and click **switch** – (Remind participants the difference between **switch** and **Change user**)



2. Select the store you would like to log into (you will not need to reenter your password)



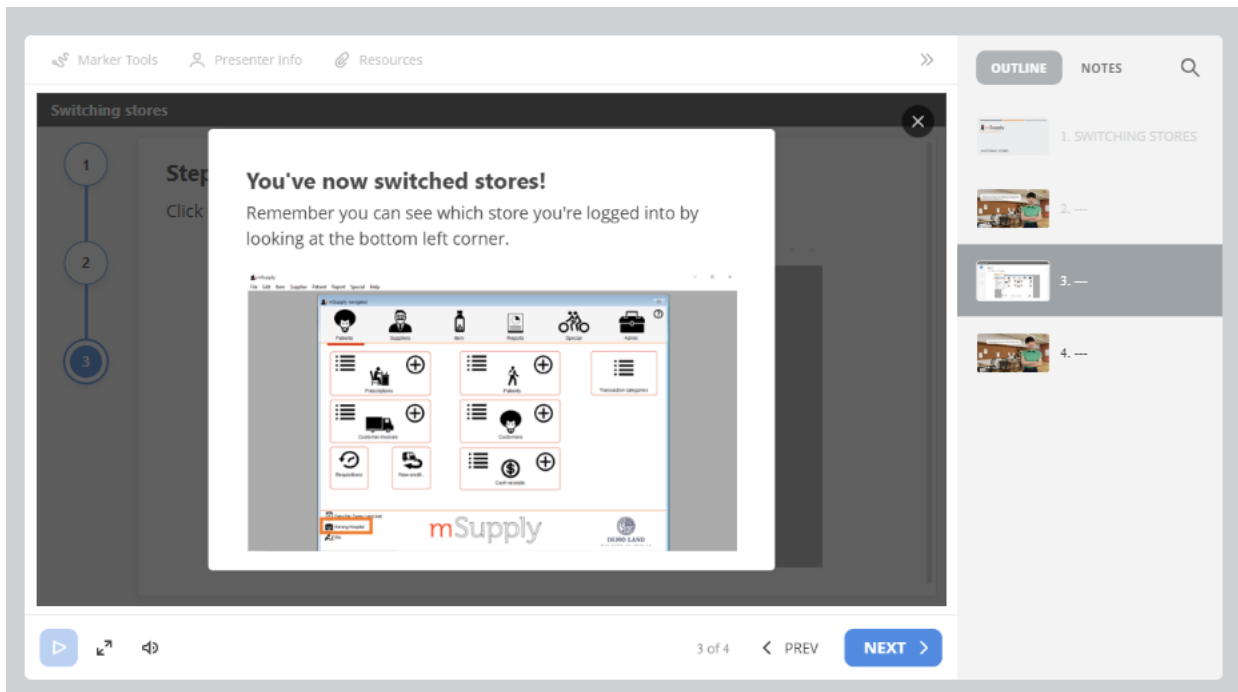
3. Click **Ok**.





You have now switched to a different store.

**Step 3:** Remind participants they can confirm the store they are working on by looking at the bottom left corner of their screen.



**Step 4:** Conclude the session by appreciating the participants.

## Session 1.4: Key Definitions.

### Objectives:

By the end of this Unit, the participants should be able to:

1. Understand and demonstrate the concept of Transaction Statuses in Open mSupply.
2. Know some common places to find an invoice's transaction status in Open mSupply.
3. Recognize when and why to finalize an invoice.

### Session Outline/Activity

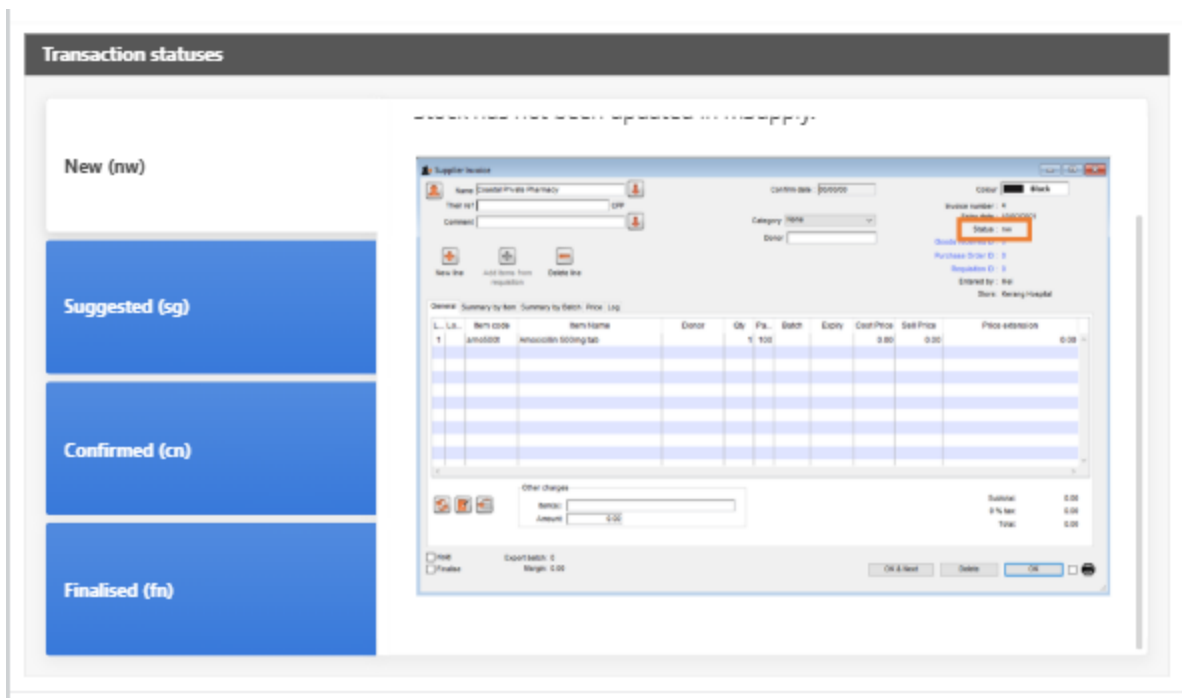
No.	Activity	Facilitation Method	Time Allotted
1.	Introduction of Key Terms Used in mSupply	Lecturette	10 minutes
2.	Transaction Statuses: Types and Location of Invoice Statuses	Demonstration	15 minutes
3.	Key Take away	Reflections	5 minutes

### Activity 1: Introduction of Key Terms Used in mSupply

**Step 1:** Get a volunteer to read the next page aloud. Explain further that for every invoice they see in mSupply the status of the invoice will tell you if it is editable or stock levels have been updated.

### Activity 2: Transaction Statuses: Types and Location of Invoice Statuses

**Step 1:** Ask participants to move to the next slide and ask if they all can see the status



Hint: make sure all participants can see the **status** at the top and explain that it is there because the invoice was just created.

**Step 2:** Ask participants to move to the next slide and explain the different statuses that are showing on the “status” column

New (nw)

Suggested (sg)

Confirmed (cn)

Finalised (fn)

## Suggested (sg)

Transaction has been opened since first creation and can still be edited.

Stock has not been updated in mSupply.

Stocktake list

+ New stock take
 + New blank stock take
 - Delete stock take

Show: All

ID	Description	Stock take date	Status	Program
3	10/02/2021 Stocktake	10/02/2021	sg	
2	5/02/2021 Stocktake	5/02/2021	fn	
1	1/02/2021 Stocktake	1/02/2021	fn	

**Step 3:** Ask participants to move to the next slide and explain the difference with the previous slide where stock was being suggested. In this slide it has been updated but not Finalized.

Stock has been updated in mSupply but transaction can still be edited.

Name	Type	St	Entered	Confirmed	Innum	Total	Their ref	Pickslip pri.	Comment	Expor...
Bird, Ben	ci	cn	10/02/2...	10/02/2...	10	0				0
Chalmers, Susan	ci	fn	5/02/2021	5/02/2021	9	0				0
Shell, Tom	ci	fn	5/02/2021	5/02/2021	6	0				0
Shell, Tom	ci	fn	5/02/2021	5/02/2021	5	0				0
Shell, Tom	ci	fn	5/02/2021	5/02/2021	4	0				0
Bird, Ben	ci	fn	5/02/2021	5/02/2021	3	0				0
Shell, Tom	ci	fn	5/02/2021	5/02/2021	2	0				0
Bird, Ben	ci	fn	5/02/2021	5/02/2021	1	0				0

Hint- Ask for questions and be sure everyone is following the explanations.

**Step 4:** Ask participants to move to the next slide and point out the changes that happen to an invoice when it is finalized.

Transaction statuses

New (nw)

Suggested (sg)

Confirmed (cn)

Finalised (fn)

Finalised (fn)

Stock has been updated in mSupply and transaction can no longer be edited.

ID	Name	Program	Date entered	Order date	Status	Comment
7	National Medical Warehouse		10/02/2021	10/02/2021	fn	
8	National Medical Warehouse		10/02/2021	10/02/2021	fn	
2	National Medical Warehouse	Tuberculosis (TB) Program	08/02/2021	08/02/2021	fn	

### Activity 3: Key Take away

**Step 1:** Get a volunteer to read out the summary of the learning and point out that

1. An invoice is not editable when it is finalized
2. Only finalize an invoice when you have crosschecked all entries and absolutely sure they are correct.

**Step 2:** Appreciate the participants as you conclude the session.

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## Session 1.5: Navigation Tabs

### Objective:

By the end of this Unit, the participants should be able to:

1. Identify and describe the functions of each Navigation Tab in Open mSupply.

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Introduction to The Navigation Tabs	Lecturette/Guided Discussion	5 minutes
2.	Exploring the Navigation Tabs	Demonstration/Guided Practice	15 minutes

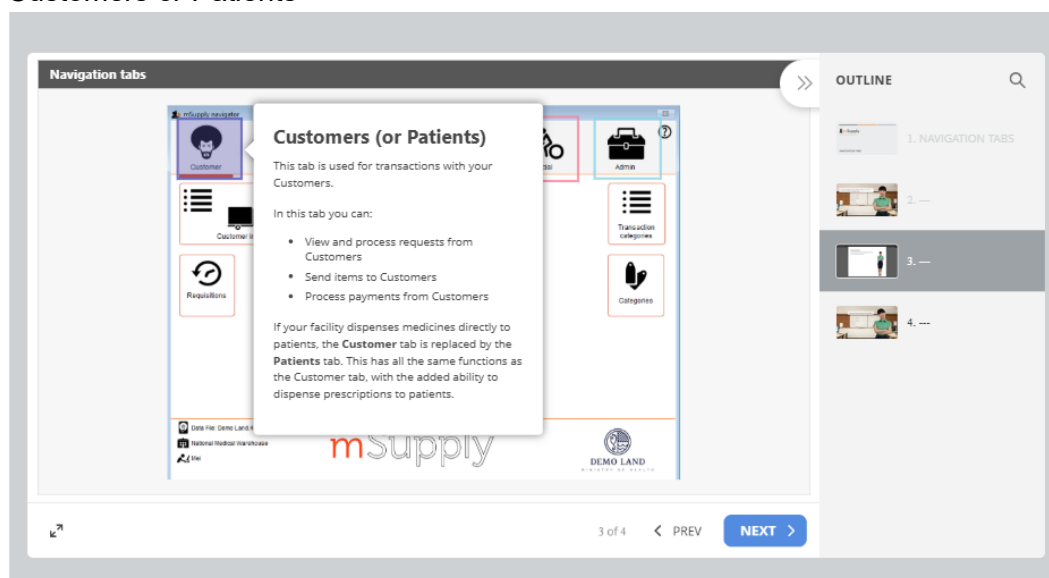
### Activity 1: Introduction to The Navigation Tabs

**Step 1:** Inform participants that the main mSupply screen is called the Navigator. We have 6 Navigation Tabs in Open mSupply.

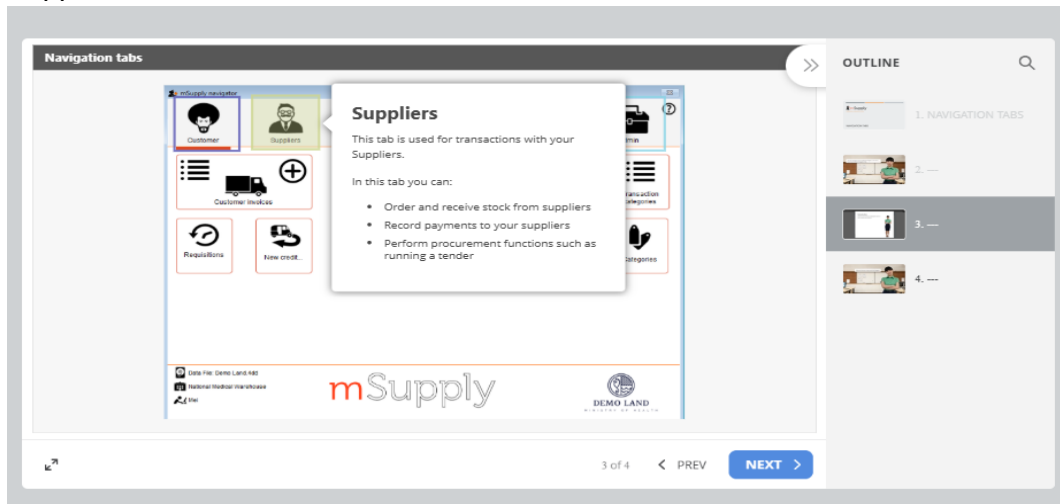
### Activity 2: Exploring the Navigation Tabs

**Step 2:** Get a volunteer to read out the explanation of each navigation tab by clicking on each of them.

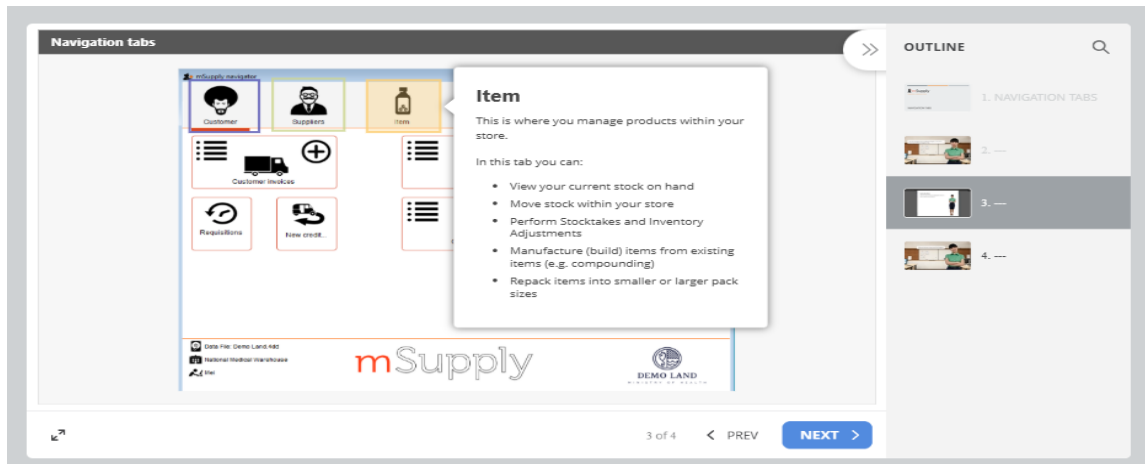
1. Customers or Patients



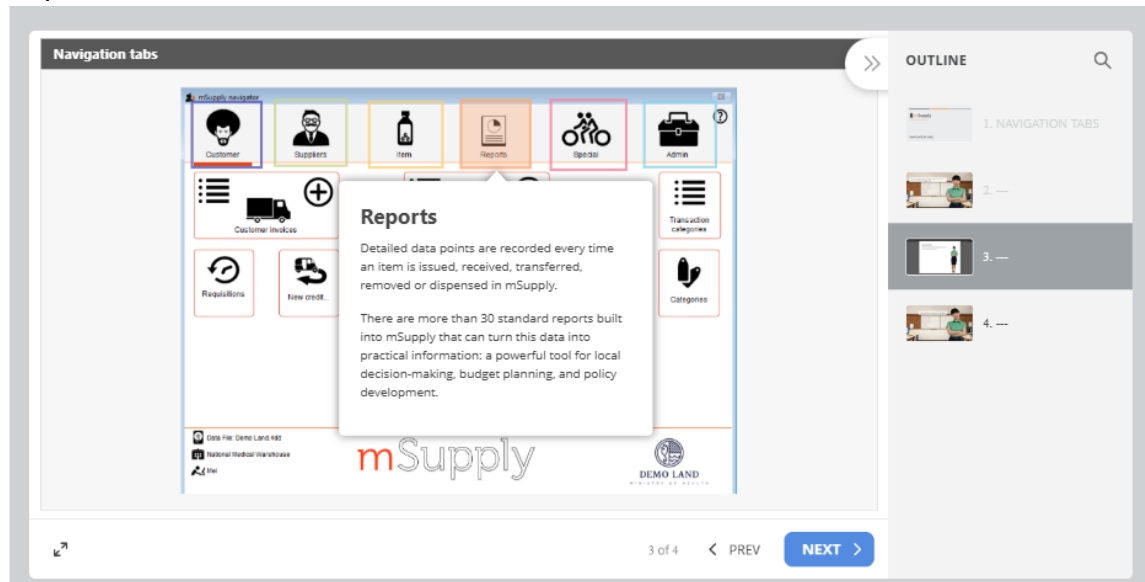
## 2. Suppliers



## 3. Items



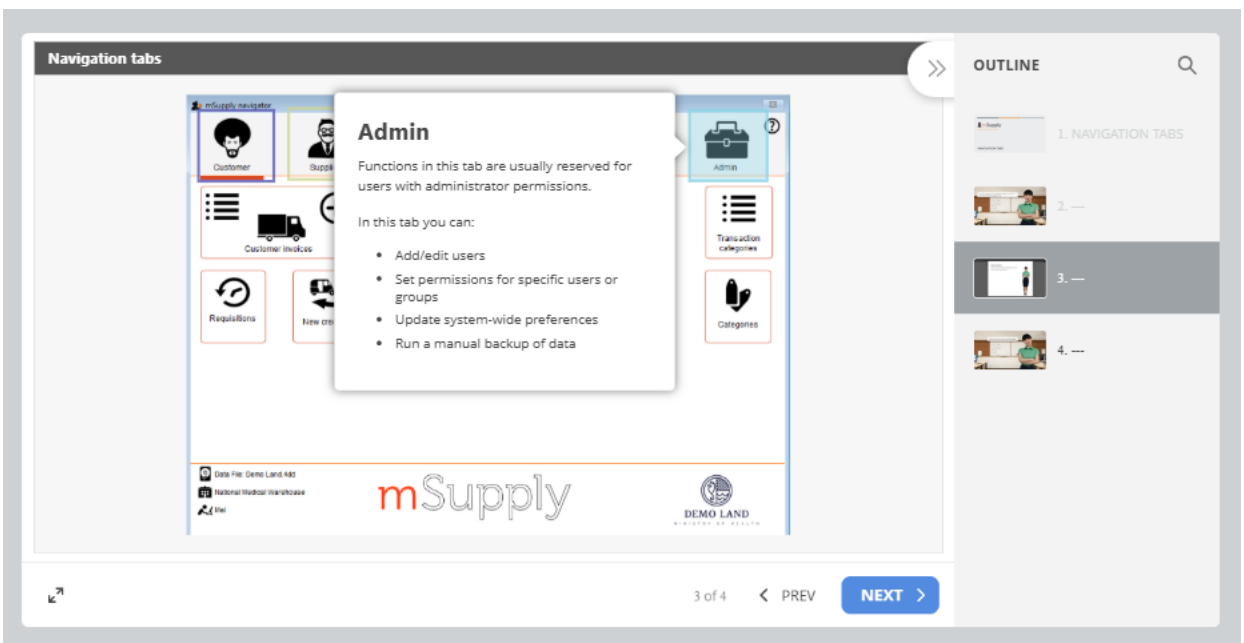
## 4. Reports



## 5. Special



## 6. Admin



Hint: Ask if everybody understands all that was read and if there is any question from any participant.

**Step 3:** Conclude by appreciating the participants



## Session 1.6: Viewing Current Stock On Hand

### Objectives:

By the end of this Unit, the participants should be able to:

1. Navigate to the “Item” Tab and view stock on hand.
2. Interpret key stock details (pack size, batch number, expiry date, location).
3. Recognize the importance of accurate data entry for reliable stock records.

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Introduction	Lecturette/Guided Discussion	5 minutes
2.	Identifying the “Item, Stock botton and exploring stock information” Tab	Demonstration/Guided Practice	5 minutes

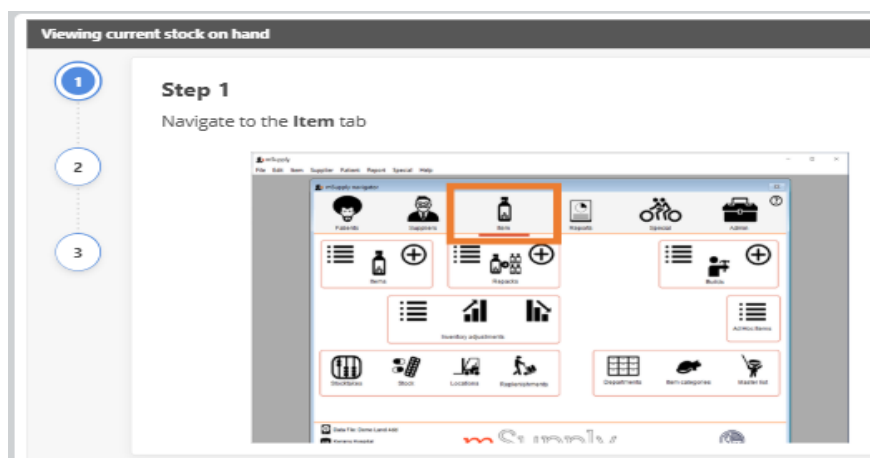
### Activity 1: Introduction

Explain to the participant that as a logistics Manager, it is good to know you current stock level per time and what stock is available per time. These are things that you can easily find out from the mSupply if you know how to navigate it.

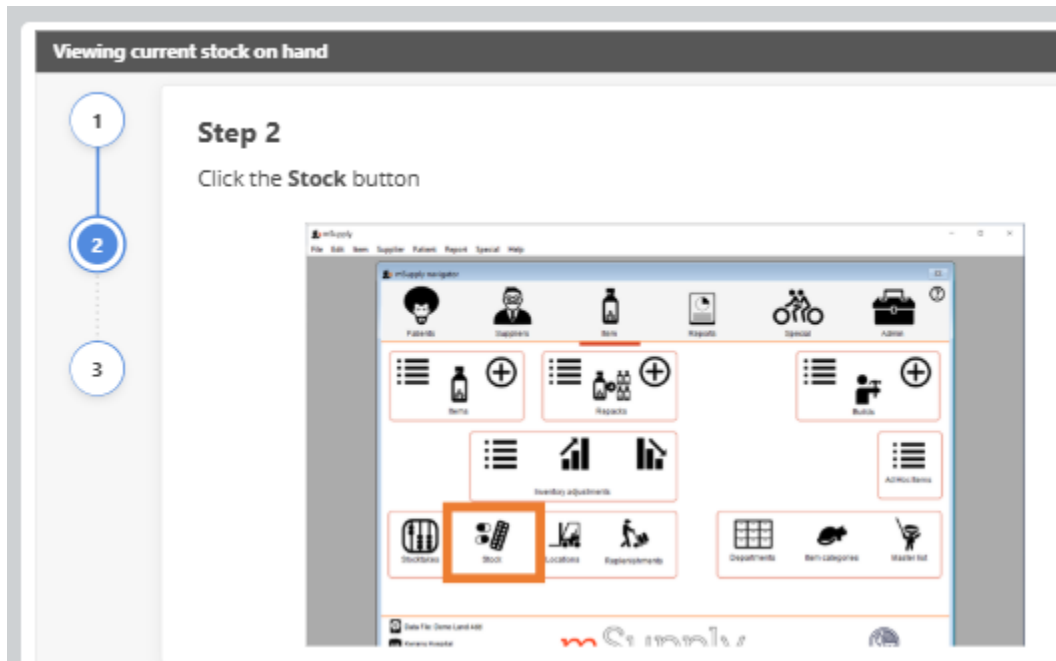
### Activity 2: Identifying the “Item, stock botton and items in stock” Tabs

**Step 1:** Tell participants that we will be looking at some 3 tabs briefly.

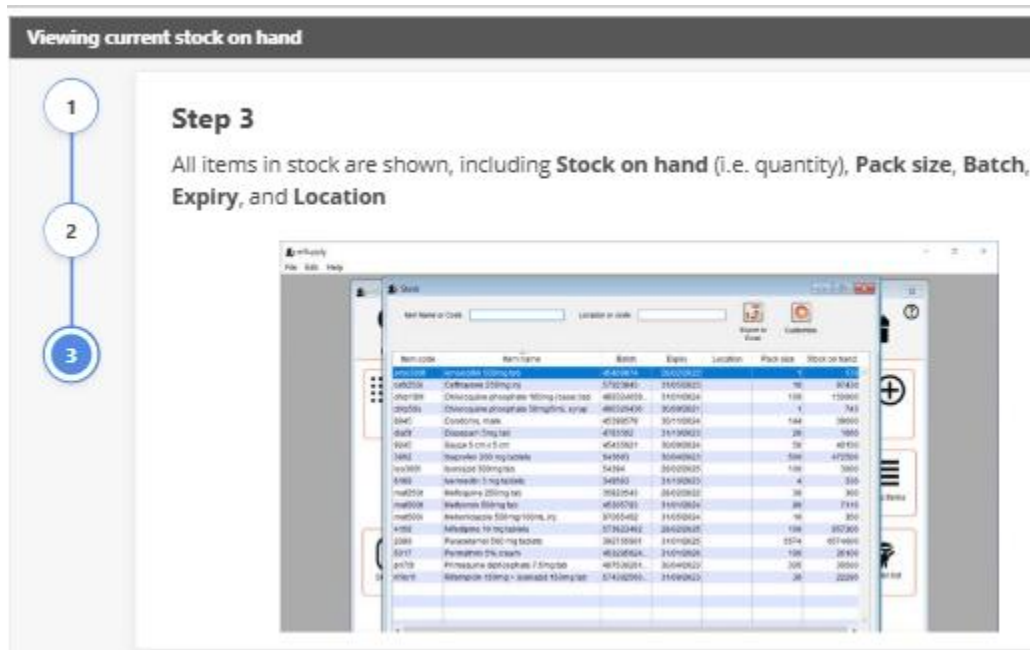
- Step 1: Item tab



- Step 2: Ask participants to identify the stock button as shown in their workbook



- Step 3: They can see all items in stock including **stock on hand**. **Pack size**, **Batch number**, **expiry date** and **location**



Hint: Ask a volunteer to read out the Tip on the next slide and ask another person to practice it using any commodity in stock.

Emphasize the next slide- Your mSupply is as good as your data entry, every time stock leaves or enters your store, record the transaction. That is the only way your stock will match what you have on the shelf.

**Step 4.** Take questions and ask for clarifications.

## Session 1.7: Internal Orders (General)

### Objectives:

By the end of this Unit, the participants should be able to:

1. Explain the concept of Internal Orders in Open mSupply.
2. Create a new Internal Order (General) step by step.
3. Add items to an Internal Order using the correct sequence.
4. Differentiate between calculated quantity and user-requested quantity.
5. Finalize an Internal Order and understand the implications of finalization.

### Session Outline/Activity

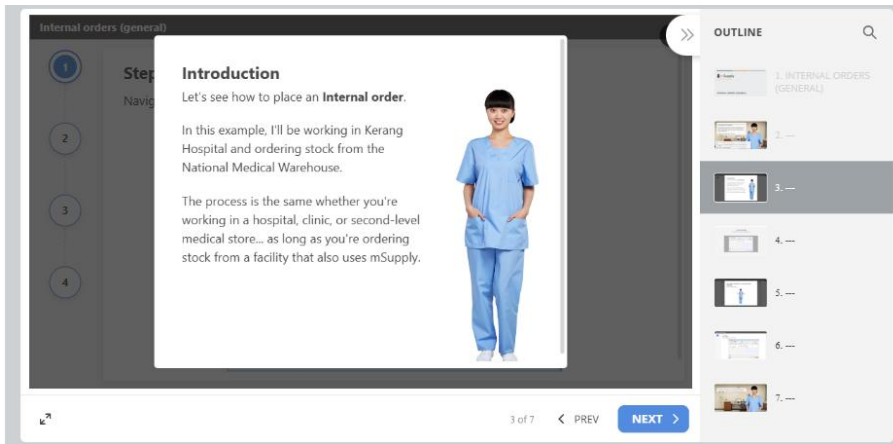
No.	Activity	Facilitation Method	Time Allotted
1.	Introduction to Concept of Internal Orders	Lecturette/Guided Discussion	5 minutes
2.	Creating a New Internal General Order	Demonstration (Trainer-led)	7 minutes
3.	Adding Items to the Order	Hands-on Practice	10 minutes
4.	Calculated Quantity Vs User Requested Quantity	Discussion	3 minutes
5.	Finalizing the Order	Demonstration + Guided Practice	5 minutes

### Activity 1: Introduction to Concept of Internal Orders

**Step 1:** Explain the concept of Internal Orders to the participants using the explanation in the slide below.

The screenshot shows a presentation slide titled "Internal orders" with the following text: "Internal orders are used to order stock from another store that uses mSupply ('internal suppliers')." and "Examples of internal suppliers include a central warehouse or a second-level medical store. This is how most facilities order stock, receiving their supplies from another facility higher up in the local supply chain." Below this is a question: "Who do you normally order stock from?". A list of three options is shown: 1. Central warehouse, 2. A second-level medical store, provincial warehouse or another facility that uses mSupply, and 3. A wholesaler or private company. To the right of the text is a video of a healthcare worker in blue scrubs. On the far right, there is an "OUTLINE" sidebar with a search icon and a list of 7 items, with item 1 highlighted.

**Step 2:** Allow participants to read the next slide which is introduction on how to place an Internal Order and explain any grey area.



## Activity 2: Creating a New Internal General Order

**Step 1:** Ask the participants to read through the slides and then practice the process with them.

### 1. Navigate to the **Supplier Tab**



### 2. Click the **Internal orders** button

**Internal orders (general)**

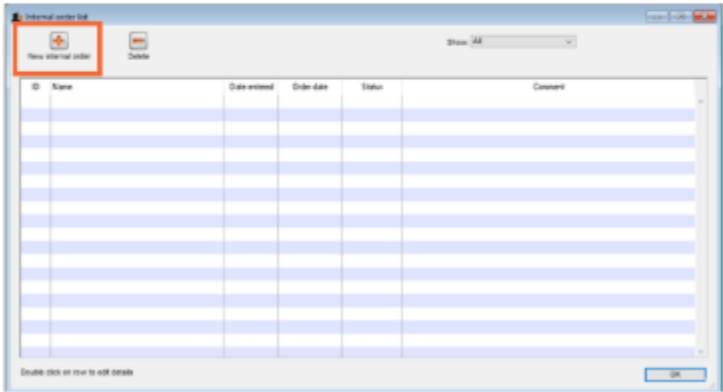
**Step 2**  
Click the **Internal orders** button



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

**Internal orders (general)**

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



4. Select the **General** button and click **OK**.

Hint: Explain the statement in bracket-for instance, the malaria program, HiV and TB programs

**Internal orders (general)**

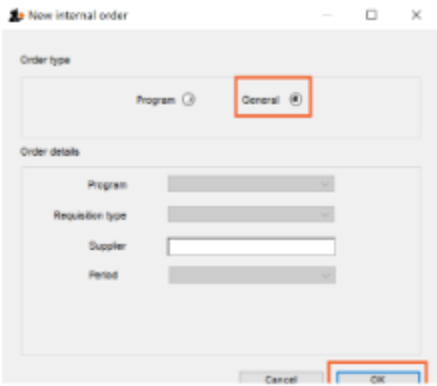
**1**

**2**

**3**

**4**

**Step 4**  
 Select the **General** button, and click **OK**  
 (If your country does not use Programs, you won't see this screen and a new order will open automatically)



5. A new requisition has been created.

**Internal orders (general)**

**1**

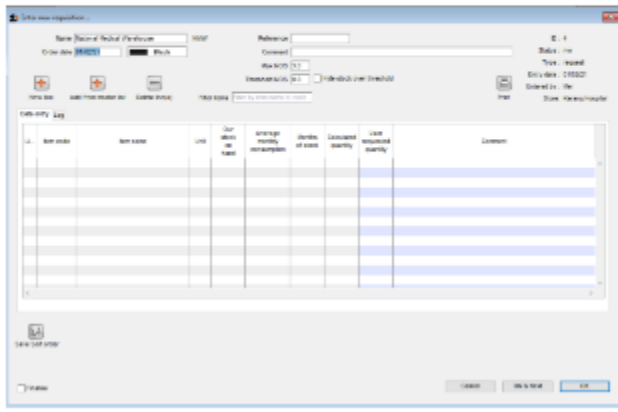
**2**

**3**

**4**

Select the **General** button, and click **OK**  
 (If your country does not use Programs, you won't see this screen and a new order will open automatically)

**A new requisition has been created**  
 Let's see how to add items to your order



### Activity 3: Adding Items to the Order

**Step 4:** Ask a volunteer to show the class how to add items to the order that has been created.

- If the participant got it right, ask the class to appreciate them before moving on
- Be sure all participants follow the sequence of adding items to the order
  1. Click on new line
  2. Enter the first few letters of the item name or type @ Tab to search for the item
  3. Click on OK
  4. Enter the quantity you want to order
  5. Keep adding items till you are done with your list.

### Activity 4: Calculated Quantity Vs User Requested Quantity

**Step 1:** Ask a volunteer to explain what a **calculated quantity** is and compare or contrast it from a **user requested quantity**.

**Step 2:** Ask participants to open the next two slides and read them or ask a volunteer to read while others listen. Explain to participants and answer questions.

The screenshot shows the 'Internal orders (general)' window in mSupply. It features a form for entering a new requisition with fields for Name, Order date, Reference, Comment, Max MOS, Threshold MOS, and Hide stock over. Below the form is a table with columns: LI, Item code, Item name, Unit, Out stock on hand, Average monthly consumption, Months of stock, and Calculated quantity. Two items are listed: 1. amc500t Amoxicillin 500mg tab and 2. rft150t Rifampicin 150mg tab/cap. A pop-up window titled 'Calculated Quantity' is overlaid on the table, explaining that the calculated quantity is recommended by mSupply based on three factors: Average monthly consumption (AMC), Stock on hand, and Months of stock. It also notes that Max MOS is the maximum months of stock to keep. The pop-up concludes that this information is displayed for every item added to the order and advises reviewing it carefully before deciding.

**Calculated Quantity**

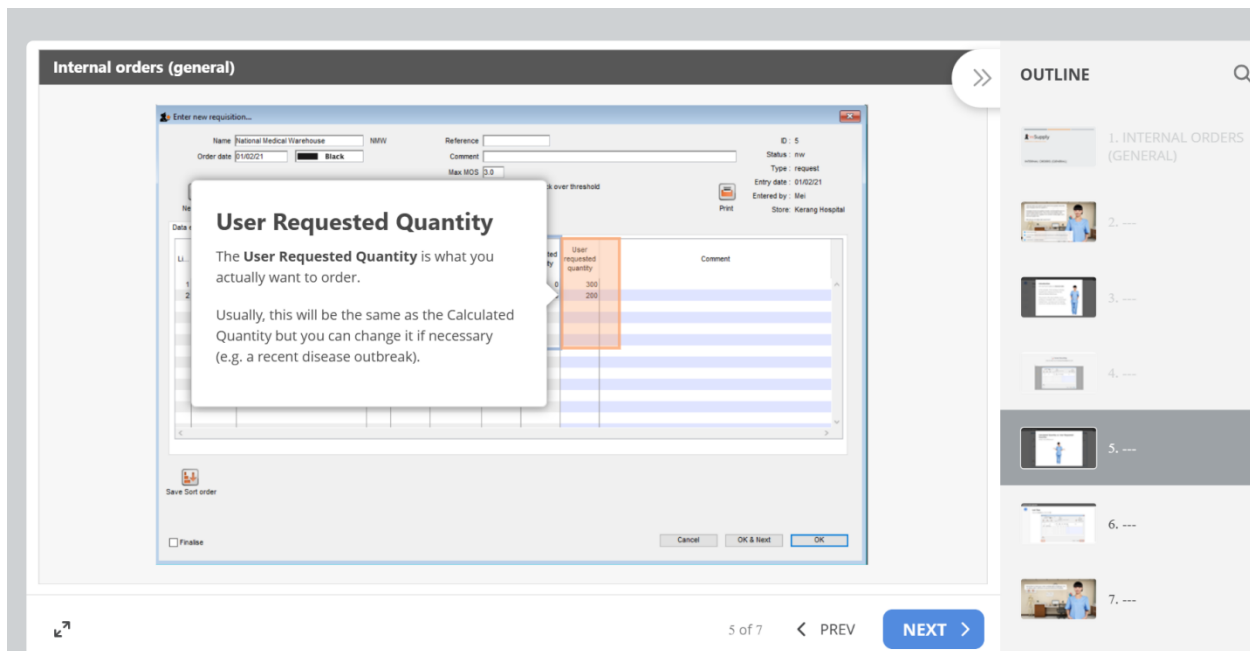
The **Calculated Quantity** is the quantity mSupply recommends you should order based on your:

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

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

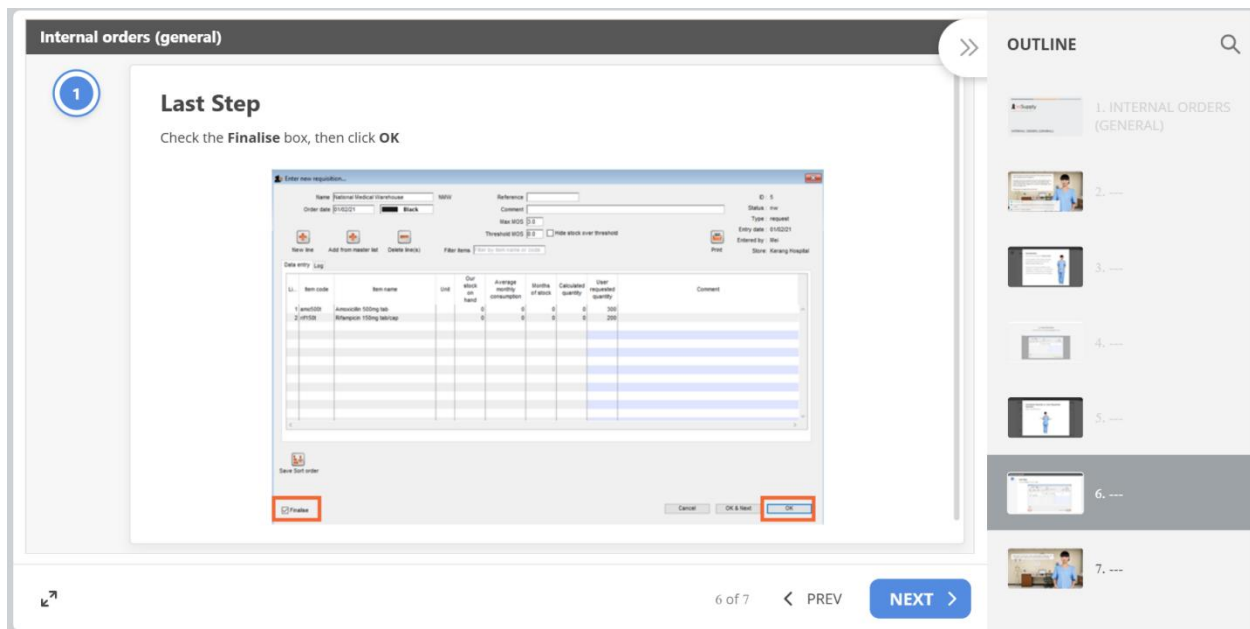
*You should review it carefully before deciding*





## Activity 5: Finalizing the Order

**Step 1:** Ask participants if they can all identify finalize button and then OK to conclude the transaction.



**Step 2:** Explain to participants that a finalized order can no longer be edited. That means users must learn to go through their entries thoroughly before clicking OK



## Session 1.8: Internal Orders (Program)

### Objectives:

By the end of this Unit, the participants should be able to:

1. Explain the internal program order
2. Describe the process of creating an internal program order
3. Identify the key features of internal program
4. Explain the difference between Regular and Emergency order

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Introduction to Internal Program Orders	Lecturette/Guided Discussion	5 minutes
2.	Step-by-Step: Creating an Internal Program Order	Demonstration (Trainer-led)/Hands-on Practice	15 minutes
3.	Key Features of Internal Program Orders	Slide Presentation/Guided Discussion	10 minutes
4	Regular vs. Emergency Orders	Lecturette/Scenario Discussion	5 minutes

### Activity 1: Introduction to Internal Program Orders

**Step 1:** Remind participants that if the orders are for programs there may be a few additional information that will be required and that is why it is separated from the general orders.

Hint: Remember to emphasize the selection keys for internal General orders and internal program orders

**Step 2:** Ask a volunteer to read out the introduction slide.

#### Introduction

In some countries, certain items are ordered and managed separately to general stock. These **Programs** may have strict schedules for ordering, and additional information may need to be provided to a supplier when requesting stock.

Some examples include:

- Malaria, tuberculosis or HIV programs
- Family planning programs
- Vaccine programs

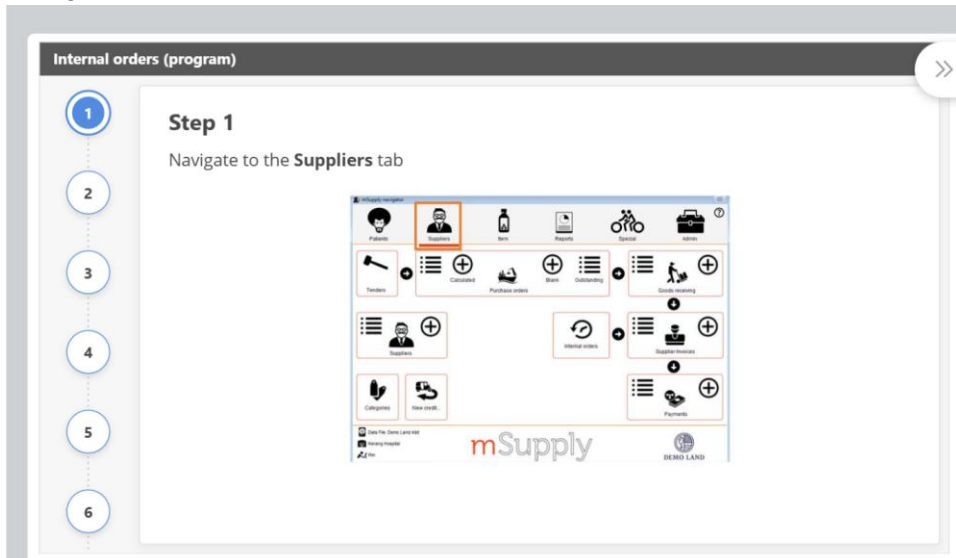
Let's see how we place an **Internal Order** for a **Program**.



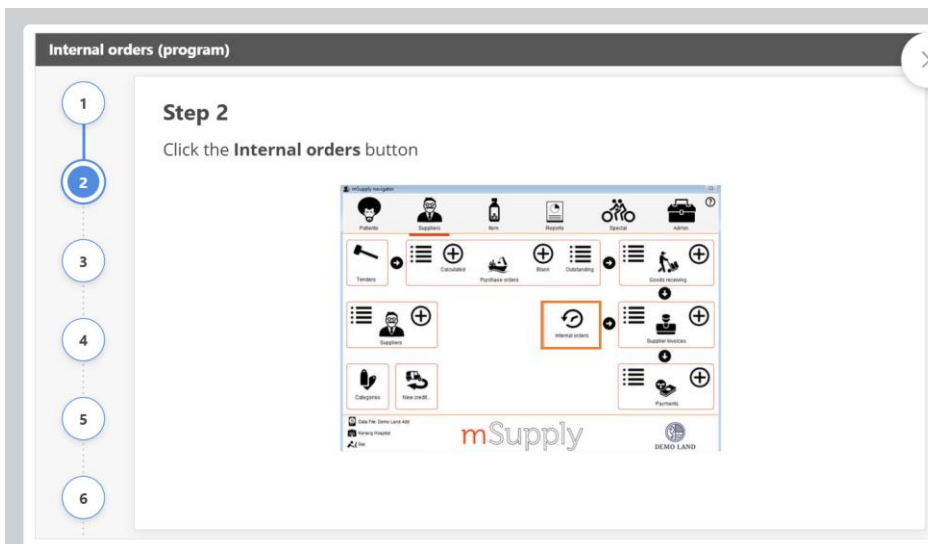
## Activity 2: Step-by-Step: Creating an Internal Program Order

**Step 1:** Ask participants to read out the slides, one at a time while others follow. Provide more clarification or details on the steps where necessary.

1. Navigate to the **Supplier** tab



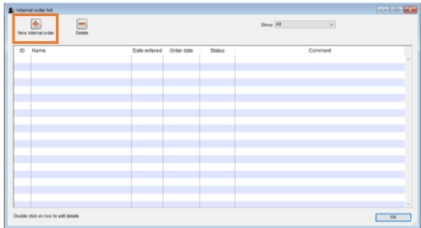
2. Click the **Internal orders** button



- Click the **New internal order** button

**Internal orders (program)**

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

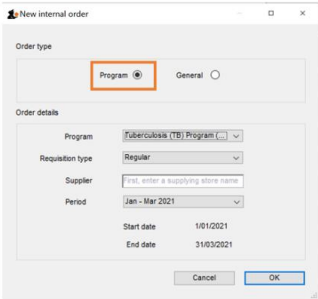


The screenshot shows a window titled 'Internal orders (program)'. On the left, there is a vertical list of steps numbered 1 to 6. Step 3 is highlighted. The main area of the window displays a table with columns: ID, Name, Date entered, Order date, Status, and Comment. A red box highlights the 'New internal order' button in the top left corner of the window.

- Select the **Program** button

**Internal orders (program)**

**Step 4**  
Select the **Program** button

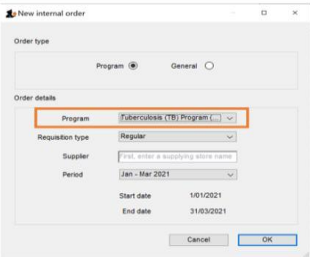


The screenshot shows a dialog box titled 'New internal order'. It has two tabs: 'Program' (selected) and 'General'. Under the 'Order type' section, the 'Program' button is highlighted with a red box. Below this, the 'Order details' section contains fields for Program (dropdown), Requisition type (Regular), Supplier (text input), Period (dropdown), Start date (1/01/2021), and End date (31/03/2021). There are 'Cancel' and 'OK' buttons at the bottom.

- Select the relevant **Program** from the dropdown list

**Internal orders (program)**

**Step 5**  
Select the relevant **Program** from the dropdown list



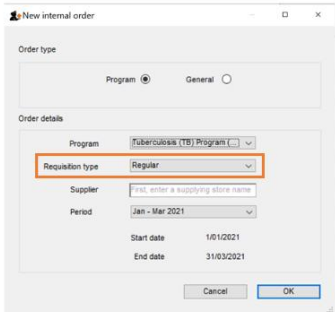
The screenshot shows the same 'New internal order' dialog box as in Step 4. In this step, the 'Program' dropdown menu in the 'Order details' section is highlighted with a red box. The dropdown list is open, showing 'Tuberculosis (TB) Program' as the selected option. The 'Cancel' and 'OK' buttons are visible at the bottom.

6. Select the requisition type from the dropdown list. (usually either **Regular** or **emergency**)

**Internal orders (program)**

**Step 6**

Select the **Requisition type** from the dropdown list (usually either **Regular** or **Emergency**)



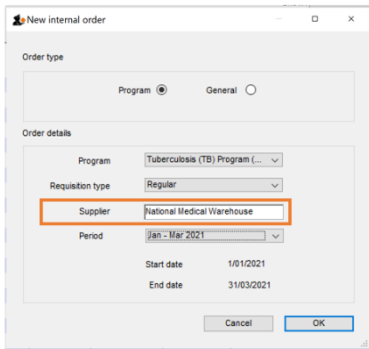
The screenshot shows a 'New internal order' dialog box. Under 'Order details', the 'Requisition type' dropdown is highlighted with a red box and set to 'Regular'. Other fields include 'Program' (Tuberculosis (TB) Program), 'Supplier' (First, enter a supplying store name), 'Period' (Jan - Mar 2021), 'Start date' (1/01/2021), and 'End date' (31/03/2021). Buttons for 'Cancel' and 'OK' are at the bottom.

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

**Internal orders (program)**

**Step 7**

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



The screenshot shows the same 'New internal order' dialog box. In this step, the 'Supplier' dropdown is highlighted with a red box and set to 'National Medical Warehouse'. The 'Requisition type' remains 'Regular'. Other fields and buttons are the same as in Step 6.

- Select the **Period** for this order (Note that the **Start date** and **End date** will update automatically based on this selection)

3  
4  
5  
6  
7  
8

### Internal orders (program)

## Step 8

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

- A new order has been created- the order sheet will display

3  
4  
5  
6  
7  
8

### Internal orders (program)

## Step 9

A new requisition has been created

Let's see how to complete our program order...

As you can see, the items on the order have already been added for you

Item code	Item name	Unit	Current stock	Average monthly consumption	Months of stock	Calculated quantity	User requested quantity	Reason	Comment
1.00000	Item name	2000	0	0	0	0	0		
2.00000	Item name	2000	0	0	0	0	0		
3.00000	Item name	2000	0	0	0	0	0		
4.00000	Item name	2000	0	0	0	0	0		

Hint- Take the next 5 minutes to discuss how the program order is different from the general order. Allow volunteers to respond.

### Activity 3: Key Features of Internal Program Orders

**Step 1:** Allow participants to view and study using the slides to understand some key features of Internal Program Orders that makes it different from Internal General Orders.

#### 1. Items are restricted.

### Items are restricted

The list of items in the program is automatically added.

It's impossible to add any other items to this order (the **New Line** button is gone!)

#### 2. Very specific information can be captured

### Very specific information can be captured

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

These questions are set up by administrators.



### 3. Order schedules are restricted

### Internal orders (program)

## Order schedules are restricted

You can usually only place one Program order for each period.

In contrast, you can place as many General orders as you like.

**Enter new requisition...**

Supplier: National Medical Warehouse NMW

Order date: 04/02/2021

Program: Tuberculosis (TB) Program

Order type: Regular

Period: Jan - Mar 2021

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

Reference:

Comment:

Max MOS: 3.0

Threshold MOS: 1.0

☐ Hide stock over threshold

ID: 2

Status: nw

Type: request

Entry date: 04/02/2021

Entered by: Mei

Store: Kerang Hospital

Data entry Log Indicators

Li.	Item code	Item name	Unit	Our stock on hand	Average monthly consumption	Months of stock	Calculated quantity	User requested quantity	Reason	Comment
1	iso300t	Isoniazid 300mg tab		3000	0	0	0	0		
2	rif150t	Rifampicin 150mg tab/cap		0	0	0	0	0		
3	rita1t	Rifampicin 150mg + isoniazid 150mg tab		22290	0	0	0	0		
4	rita7t	Rifampicin 150mg + isoniazid 75mg tab		0	0	0	0	0		

Save Sort order

☐ Finalise

Cancel OK & Next OK

We will demonstrate what it means for order schedule to be restricted. Explain that orders are generated per period using the demonstration online

#### Activity 4: Regular vs. Emergency Orders

**Step 1:** Explain how to differentiate a regular order from an emergency order and let participants know that the system keeps track of the emergency orders that we place per period.

For Emergency, Simply select Emergency from the Requisition type dropdown list. The order can still be placed, but this time its recorded as an emergency order and we can easily track how many of those orders are being placed.

**Step 2:** Conclude and move to the next session.

## Session 1.9: Supplier Invoices

### Objectives:

By the end of this Unit, the participants should be able to:

1. Record received stock using supplier invoices in mSupply.
2. Review and finalize supplier invoices.
3. Create manual supplier invoices for external suppliers.

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Introduction to Supplier Invoices	Lecturette + Guided Discussion	5 minutes
2.	Viewing Supplier Invoices and Understanding Supplier Invoice Fields	Demonstration (Trainer-led)	10 minutes
3.	Adding Stock to Inventory from Supplier Invoice	Demonstration/ Hands-on Practice	10 minutes
4.	Creating a Manual Supplier Invoice (External Supplier)	Demonstration/Guided Practice	15 minutes

### Activity 1: Introduction to Supplier Invoices

**Step 1:** Start by telling participants that when stock is received into the warehouse from a supplier, we need to enter this into the mSupply, this is done by entering a supplier invoice

### Activity 2: Viewing Supplier Invoices and Understanding Supplier Invoice Fields

**Step 1:** Get a volunteer from the participants to read each slide and be sure every participant is following the discussion.

1. Navigate to the supplier tab

**Supplier invoices**

**Step 1**  
Navigate to the **Suppliers** tab




The screenshot shows the mSupply desktop application. At the top, a dark grey header bar contains the text 'Supplier invoices'. Below this, a vertical sidebar on the left contains four numbered circles (1, 2, 3, 4). The main area displays a grid of icons representing different functions: Patients, Suppliers (highlighted with a red box), Items, Reports, Special, Admin, Tender, Catalogue, Purchase orders, Stock, Outstanding, Goods receiving, Supplier orders, Supplier invoices, Payments, Categories, New credit, Internal orders, and Payments. The mSupply logo is visible at the bottom center, and the DERO LAND logo is at the bottom right.

2. Click on the **supplier invoice list** button

**Supplier invoices**

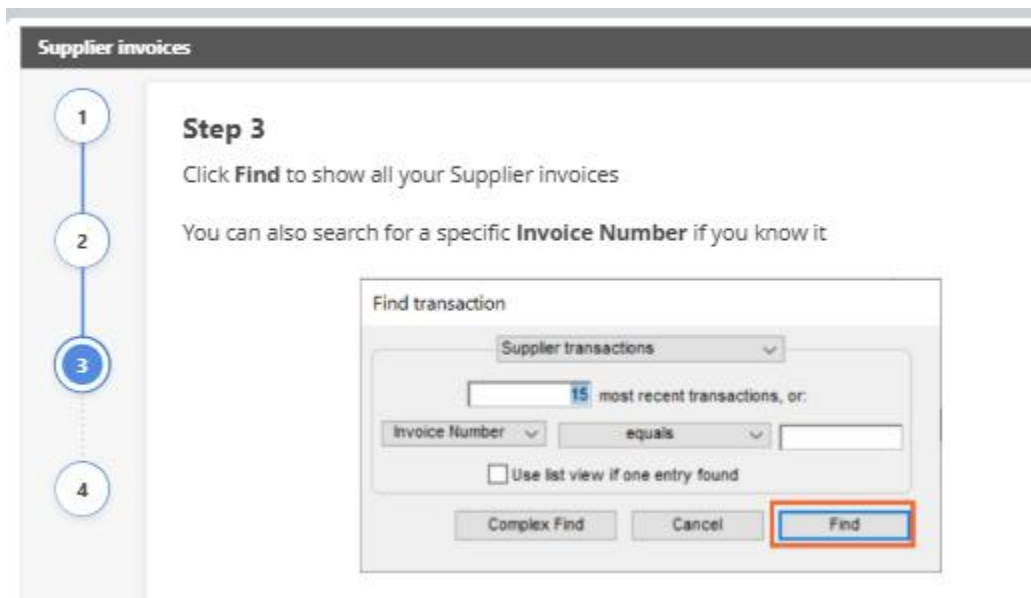
**Step 2**  
Click the **Supplier invoices list** button

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

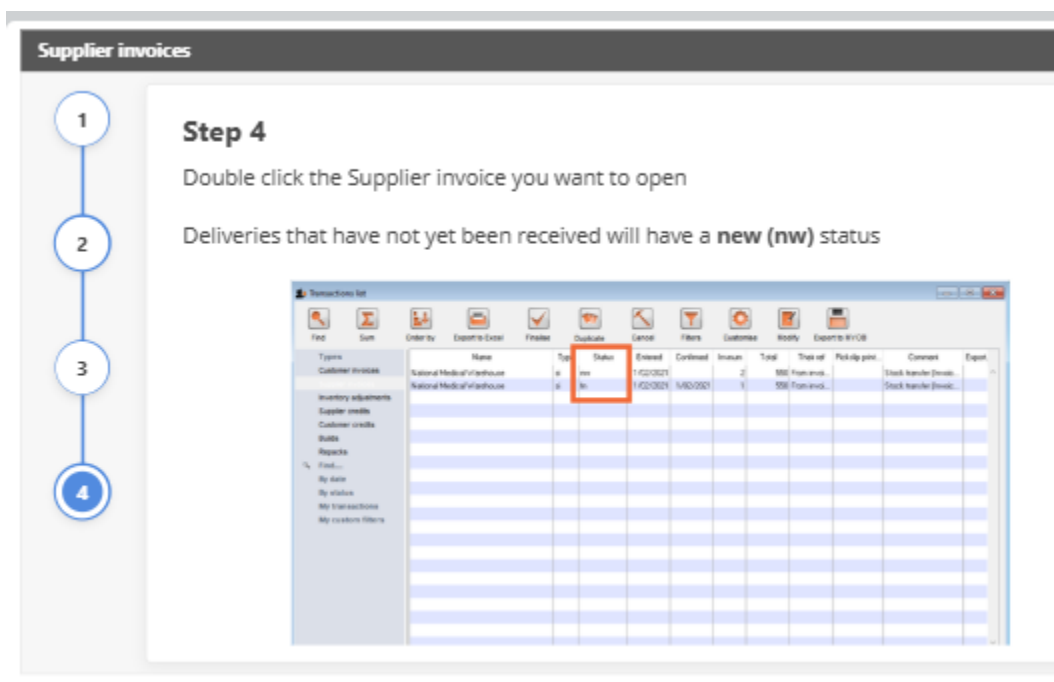


The screenshot shows the same mSupply desktop application as in Step 1. The 'Suppliers' tab is now selected and highlighted with a red box. The 'Supplier invoices list' button, which is represented by a list icon with a plus sign, is also highlighted with a red box. The rest of the interface, including the sidebar and other icons, remains the same.

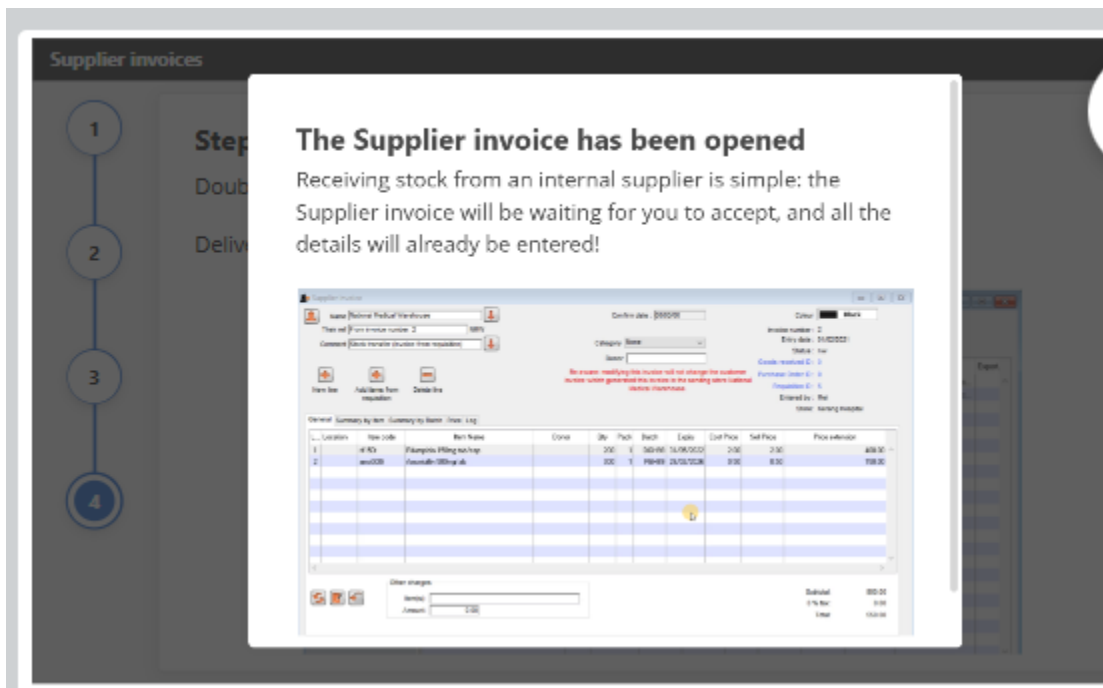
3. Click **find** to show all your supplier invoices



4. Double click the supplier invoice you want to open

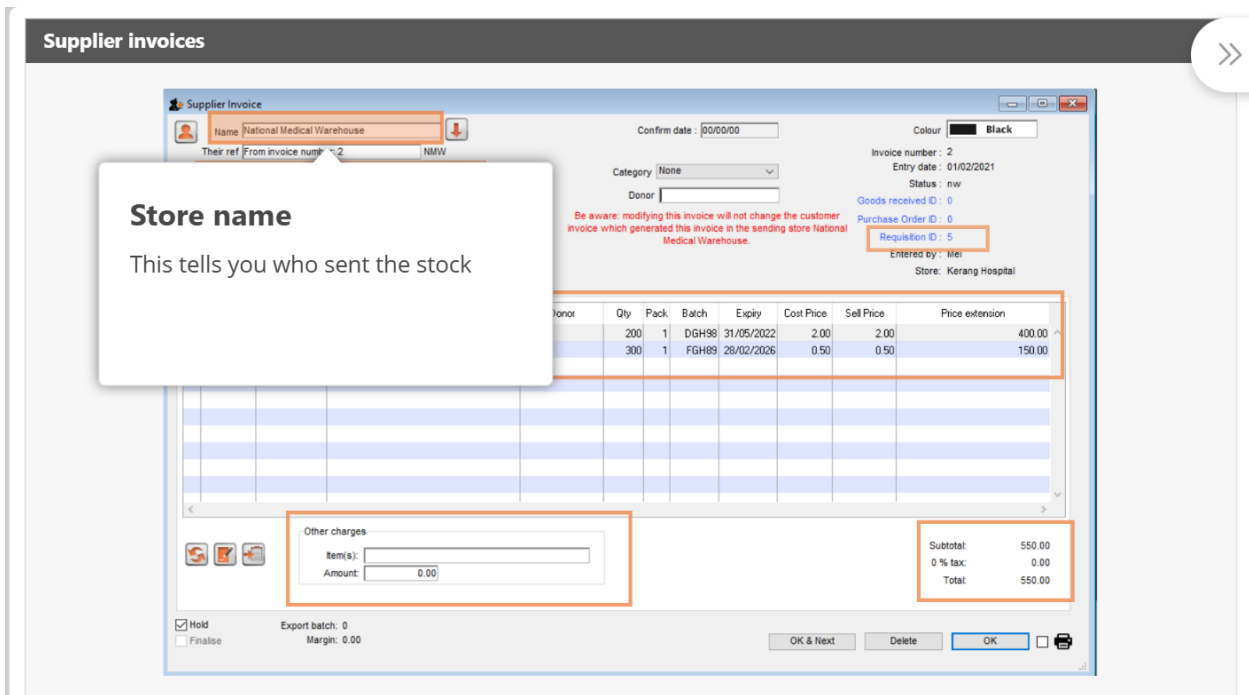


5. Supplier invoice has been opened.



**Step 2:** Take note of the following and properly explain all fields to the understanding of every participant.

1. Store name



2. Comment if the requisition was sent from an internal order that you sent

**Supplier invoices**

**Supplier Invoice**

Name: National Medical Warehouse

Their ref: From invoice number: 2

Comment: Stock transfer (invoice from requisition)

New line Add items from requisition Delete line

General Summary by Item Summary by Batch Price Log

L	Location	Item code	Item Name	Price	Price extension
1		ri150t	Rifampicin 150mg tab/cap	400.00	400.00
2		amo500t	Amoxicillin 500mg tab	150.00	150.00

Other charges:

Item(s):

Amount: 0.00

Subtotal: 550.00

0 % tax: 0.00

Total: 550.00

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

**Comment**

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

3. Requisition ID

**Supplier invoices**

**Supplier Invoice**

Name: National Medical Warehouse

Their ref: From invoice number: 2

Comment: Stock transfer (invoice from requisition)

New line Add items from requisition Delete line

General Summary by Item Summary by Batch Price Log

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1		ri150t	Rifampicin 150mg tab/cap	400.00	400.00
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Other charges:

Item(s):

Amount: 0.00

Subtotal: 550.00

0 % tax: 0.00

Total: 550.00

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

**Requisition ID**

This tells you which Internal order the Supplier invoice originated from

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

Invoice number: 2

Entry date: 01/02/2021

Status: nw

Goods received ID: 0

Purchase Order ID: 0

Requisition ID: 5

Entered by: Mei

Store: Kerang Hospital

#### 4. Invoice price

**Supplier invoices**

**Supplier Invoice**

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

New line Add items from requisition Delete line

General Summary by Item Summary by Batch

L.	Location	Item code	Item Name	Donor	Qty	Unit Price	Price extension
1		ri150t	Rifampicin 150mg tab/cap		200	2.00	400.00
2		amo500t	Amoxicillin 500mg tab		300	0.50	150.00

Other charges

Item(s):  
 Amount: 0.00

Subtotal: 550.00  
 0 % tax: 0.00  
 Total: 550.00

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

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

#### 5. Other charges

**Supplier invoices**

**Supplier Invoice**

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

New line Add items from requisition Delete line

General Summary by Item Summary by Batch Price Line

L.	Location	Item code	Item Name	Donor	Qty	Unit Price	Price extension
1		ri150t	Rifampicin 150mg tab/cap		200	2.00	400.00
2		amo500t	Amoxicillin 500mg tab		300	0.50	150.00

Other charges

Item(s):  
 Amount: 0.00

Subtotal: 550.00  
 0 % tax: 0.00  
 Total: 550.00

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

**Other charges**  
 If necessary, you can record other charges for the invoice (e.g. transport)  
 This is optional and may be left blank  
 Any cost entered here will be added to the total value of the invoice

## 6. Items sent

**Supplier invoices**

**Supplier Invoice**

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

Confirm date: 00/00/00  
Category: None  
Donor:   
Colour: Black  
Invoice number: 2  
Entry date: 01/02/2021  
Status: nw  
Goods received ID: 0  
Purchase Order ID: 0  
Requisition ID: 5  
Entered by: Mei  
Store: Kerang Hospital

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

New line Add items from requisition Delete line

L	Location	Item code	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1		ri150t	Rifampicin 150mg tab/cap		200	1	DGH98	31/05/2022	2.00	2.00	400.00
2		amo500t	Amoxicillin 500mg tab		300	1	FGH89	28/02/2026	0.50	0.50	150.00

General Summary by Item Summary by Batch Price Log

Other charges  
Item(s):  
Amount:

Hold ☒ Finalise  
Export batch: 0  
Margin: 0.00

Subtotal: 550.00  
0 % tax: 0.00  
Total: 550.00

Delete OK

**Items sent**

Here are the items that the Supplier sent you

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

**Step 4:** Explain what to do if there are **incorrect** entries

Hint: You can edit this by double clicking the line and making the necessary changes.

Note that critical information like the invoiced quantity cannot be edited but you can change the quantity received, this shows record of what the supplier said they sent you and what you actually received.

### Activity 3: Adding Stock to Inventory from Supplier Invoice

**Step 1:** Get another volunteer to read through the next slide - You will begin to add stock from the supplier invoice to your inventory.

1. Uncheck the hold box and check the finalize box



Supplier Invoices

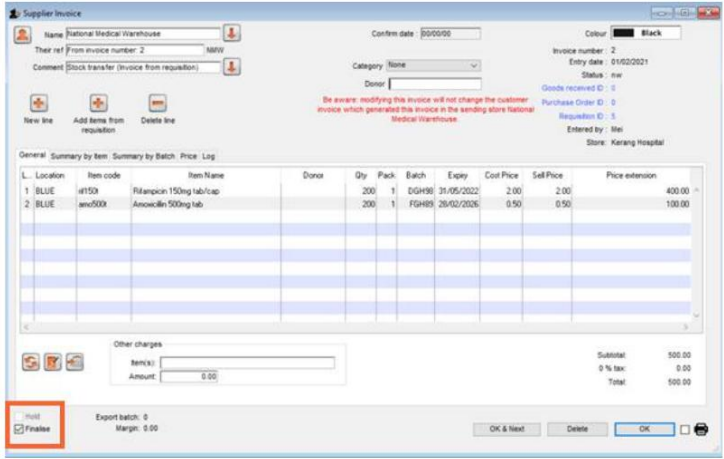
1

2

3

## Step 1

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



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

Supplier Invoices

1

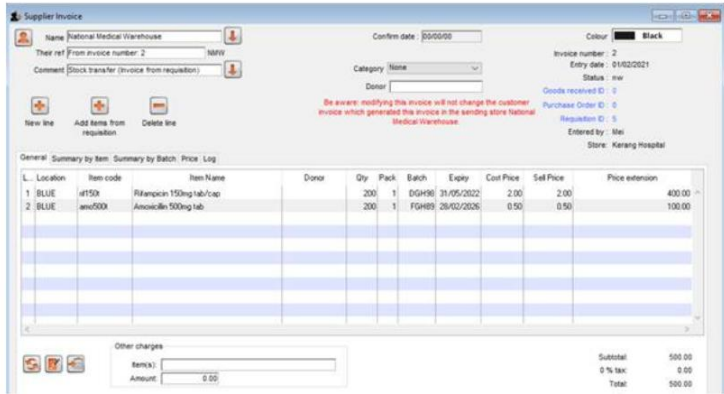
2

3

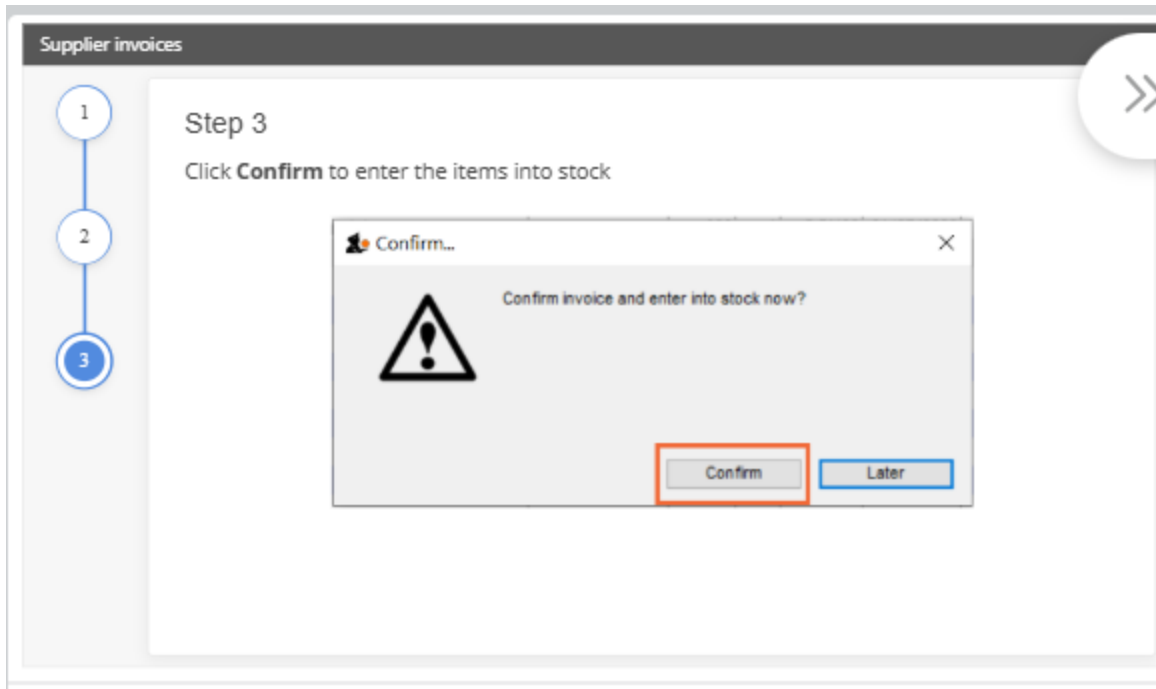
## Step 2

Click **OK**

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



3. Click **confirm** to enter the items into your stock



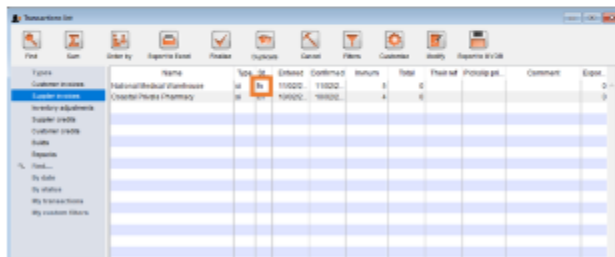
Hint:

1. Inform participants that they must get the alert notifying them they have successfully added those items.
2. Remind participants that they can always review the supplies by clicking on the **supplier invoice list** button.
3. A transaction with a status of **FN** is finalized and can no longer be edited.

New stock has now been added to your inventory!

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

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



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

#### Activity 4: Creating a Manual Supplier Invoice (External Supplier)

**Step 1:** Ask the class this question- If I receive donations from the government or I make an emergency procurement from a pharmacy in town, do I have to enter the stock in mSupply.

**Step 2:** Mention that participants will learn how to create a manual supplier invoice. Participants will also learn few handy tricks for looking up items in mSupply . You will use what you will learn to search for anything in mSupply, whether that's an item, customer name, supplier name or location. Guide participants using the following steps:

1. Click on supplier tab
2. Click on new supplier invoice button
3. Search for the supplier's name- you can type the first few letter and press TAB on your keyboard.
4. Click the **New line** button to start adding items
5. Search for the item you have received- This can be done by typing the item code, then press TAB on your keyboard, the item appears
6. Enter the received quantity and the pack size- Notice the Total Quantity is automatically calculated.
7. Enter the Batch and Expiry
8. Enter the cost of 1 pack, pay attention to the **pack size** above.

Note: The supplier invoice to use when receiving stock depends on where your delivery comes from.

Internal supplier- if your supplier uses mSupply, a supplier invoice will be waiting for you to receive in the **supplier invoice list**.

## Supplier invoices

### Internal supplier

If your supplier uses mSupply, a Supplier invoice will be waiting for you to receive in the **Supplier invoices** list



**External supplier-** If your supplier doesn't use mSupply, you have to enter a **New supplier invoice** manually.

## Supplier invoices

### External supplier

If your supplier doesn't use mSupply, you have to enter a **New supplier invoice** manually



Confirm that all participants learnt and are able to receive stock in mSupply.

## Session 1.10: Internet Connectivity

### Objectives:

By the end of this Unit, the participants should be able to:

1. Explain the role of internet connectivity in mSupply operations.
2. Describe the function of the mSupply server.
3. Recognize the effect of unstable internet on data synchronization.

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Understanding Internet Connectivity in mSupply	Lecturette/Guided Discussion	20 minutes

### Activity 1: Understanding Internet Connectivity in mSupply

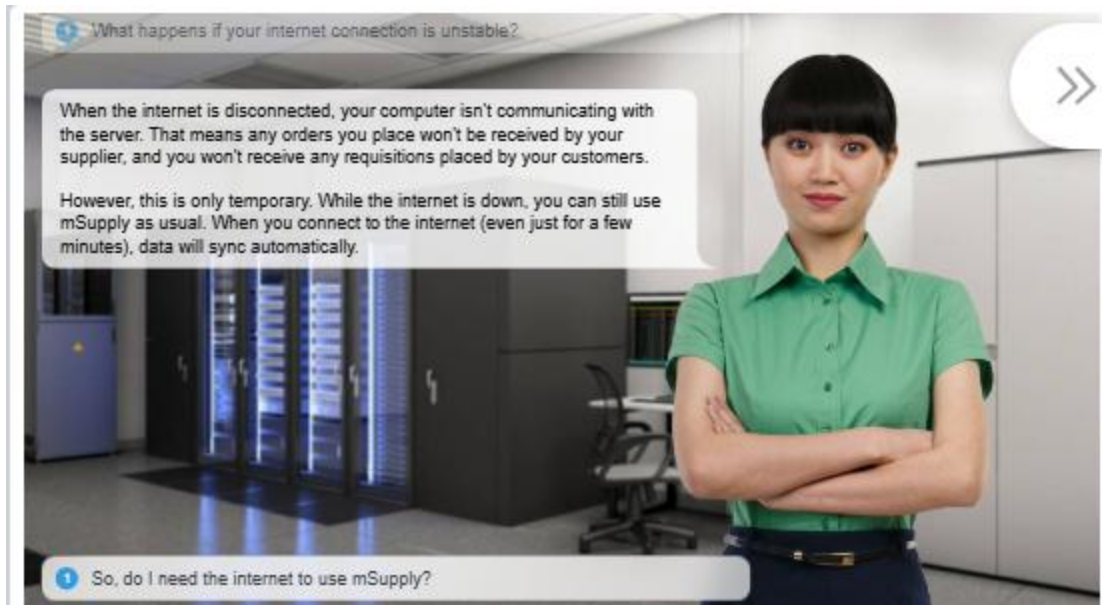
mSupply stores communicate with each other through the internet. Data from your facility's computer is sent to a central server like the one you are seeing on your trainer's guide. This is usually located at the central government headquarters in your country or remotely in the cloud.

**Step 1:** Ask a volunteer from the participants to explain what a server is. After their contribution you can ask another participant to read what is on the participants' workbook

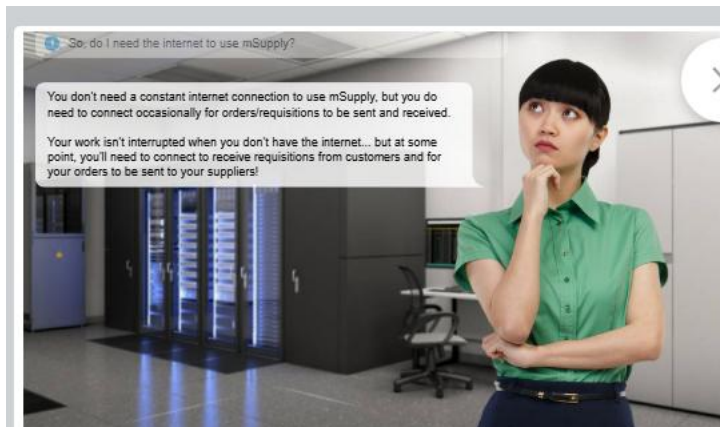
A **server** is a powerful computer designed to process incoming data and deliver data to other computers over the internet. You can think of the mSupply server as the hub of your country's chain data. It receives information from every computer around and decides what information it needs to send to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

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

**Step 2:** Ask a volunteer to tell us what happens if your internet connection is unstable, ask another volunteer to read what is on the next slide.



**Step 3:** Ask participants if we need the internet to use mSupply? Let them read statement in the slide.



**Step 4:** Appreciate them for their time.

# LEGACY LEVEL 2



## Session 2.1: Requisitions

### Objectives:

By the end of this session, the participants should be able to:

1. Process an order from a customer and issue them stock
2. Dispense stock to patients
3. Explain how mSupply tracks a patient's dispensing history
4. Receive payments from customers and patients

Time: 25 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	What is requisition	Lecturette	5 minutes
2.	Customer invoice	Demonstration/Guided Practice	10 minutes
3.	Finalising Requisition	Lecturette/ Demonstration	10 minutes

### Activity 1: What is requisition

**Step 1:** Welcome participants and make them feel comfortable. Inform the class you will take them around the mSupply and they will learn how to find and process orders from our customers.

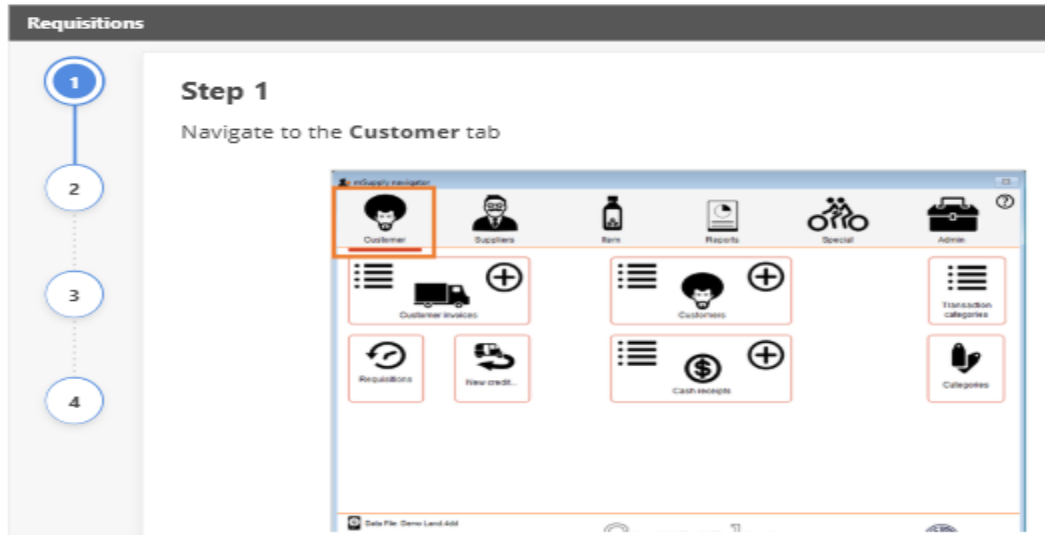
**Step 2:** Also Inform the participants that when a customer places an internal order using mSupply it will arrive the supplying store as a requisition. The supplier reviews the requisition, then issues a customer invoice to issue stock from the store.

**Step 3:** Ask participants if any volunteer can explain what a requisition is? Take few feedbacks and tell them that "A Requisition is a request for stock from a customer".

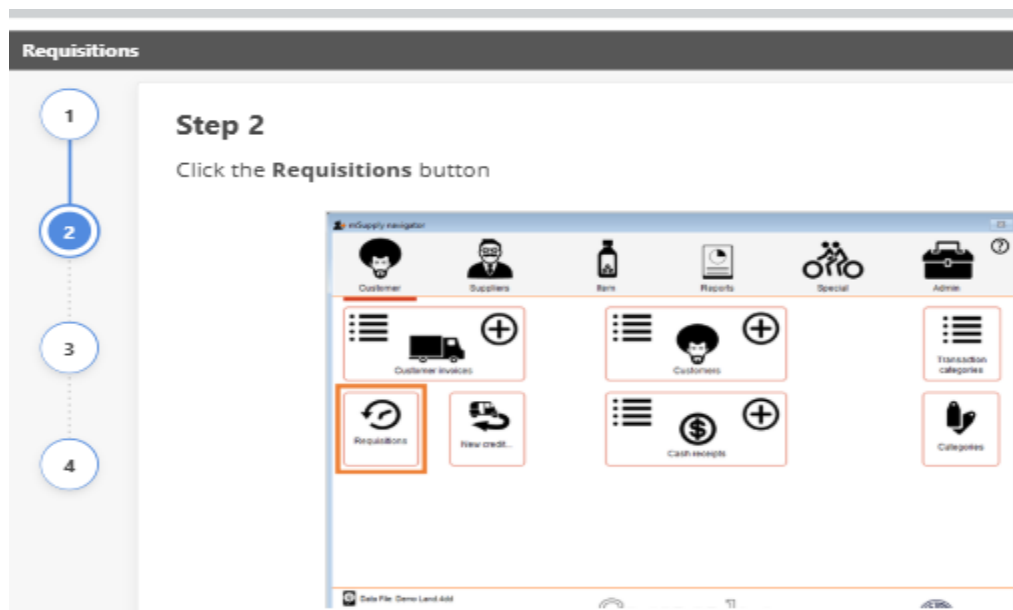
**Step 4:** lets look at Requisition step by step using the slides below.

1. Navigate to the customer tab





2. Click the requisition button



3. A list of requisition is shown- Requisition with a status of **sg** have not been processed yet

**Requisitions**

**Step 3**

A list of Requisitions is shown

Requisitions with a status of **sg** have not been processed yet

ID	Name	Program	Date entered	Requisition id	Status	Type	Comment
7	Kwara Hospital		15/02/2021	15/02/2021	sg	request	From requisition 15
6	Kwara Hospital		15/02/2021	15/02/2021	sg	request	From requisition 7
4	Kwara Hospital		15/02/2021	15/02/2021	sg	request	From requisition 5
2	Kwara Hospital	Tuberculosis (TB) Program	4/02/2021	4/02/2021	sg	request	From requisition 3

4. Double click on the requisition to open it

**Requisitions**

**Step 4**

**The Requisition is open**

Item name	Quantity	Unit	Price	Total
1. 1000ml	1000	ml	1.00	1000.00
2. 500ml	500	ml	0.50	250.00
3. 250ml	250	ml	0.25	62.50
4. 125ml	125	ml	0.125	15.625

**Note:** Inform the class that all requisitions arrive with some important information about a customer's stock situation which you can assess before deciding what will actually be issued.

You might decide to supply everything that is requested or you can make some changes, for example, you might supply a smaller quantity than what was requested due to insufficient supplies at your own facility.

**Step 5:** Show participants a picture of what you are talking about also explain what Stock on hand means.

## 1. Our stock on hand

### Requisitions

#### Our stock on hand

How much stock YOU currently have available in your store

## 2. Customer current stock on hand means how much stock the customer currently has available in their store

### Requisitions

#### Customer current stock on hand

How much stock the customer currently has available in their store

## 3. Customer monthly usage means the customer's average monthly consumption (AMC) of each item, based on their historical usage data.

### Requisitions

#### Customer monthly usage

The customer's average monthly consumption (AMC) of each item, based on their historical usage data

## 4. Customer requested means how much stock the customer has requested that you send them

### Requisitions

**Customer requested**

How much stock the customer has requested that you send them

## 5. Already issued

### Requisitions

**Customer requested**

How much stock the customer has requested that you send them

## 6. Remaining to supply

### Requisitions

**Remaining to supply**

How much stock you should issue the customer to completely fulfill the Requisition

This is the amount the customer initially requested minus the amount already issued to them

## 7. Supply this invoice

### Requisitions

#### Supply this invoice

The quantity you will actually supply now, which automatically populates with the amount in the **Remaining to supply** column

You may increase, decrease or round-off the amount to supply, and you can enter a **Comment** to explain any changes

## 8. Max MOS and threshold MOS

### Requisitions

#### Max MOS and Threshold MOS

You can specify how much stock you wish to supply based on **Months of Stock (MOS)**

If you set a higher **Max MOS**, this will automatically calculate more stock to give the customer

The minimum MOS is set by changing the **Threshold MOS**: if the customer has more than the Threshold

Notify the class that when you have entered the quantity you wish to supply the customer, you must click the create customer invoice button.

When you have entered the quantities you wish to supply the customer, you must click the Create Customer Invoice button.

## Activity 2: Customer invoice

**Step 1:** The items in the customer invoice appear in red. Participants to take note of the following steps, also ensure that participants can see and identify the locations on the screen as shown in the pictures. Let's look at the step-by-step.

**Customer Invoices**

**Step 1**

The items in the Customer invoice appear in red

These are called **Placeholder lines**: this means that stock with a specific batch and expiry hasn't been allocated to them yet

## Step 2

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

## Step 3

...then click **Issue stock for all placeholder lines**

## Step 4

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

If you do not have the item in stock, the line will remain red

## Step 5

To print a **Picking Slip**, check the **Print** box and click **OK**

## Step 6

Facility staff pick the stock and prepare the order for delivery

## Step 7

When the order is picked and is awaiting transport, reopen the Customer invoice from the **Customer Invoices list**

## Step 8

Click the **Confirm** button

## Step 9

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

The stock has now been removed from your inventory

A Supplier invoice will now be waiting at your customer's store in their **Supplier Invoices list**, ready for them to accept when the stock arrives

## Step 2: Ask participants if they have any questions

### Activity 3: Finalising Requisition


**Step 1:** Inform participants that you can create multiple customer invoices from a single Requisition. This might happen if you don't have enough stock to completely fulfil a requisition when it first arrives. When you are finished with a requisition, you can finalise it.

**Step 2:** Lets look at final steps.

▼ Finalise the Requisition if...


You have supplied everything from the Requisition; or

You haven't supplied everything from the Requisition but you don't intend to supply any more later



▼ Do NOT Finalise the Requisition if...

You haven't supplied everything from the Requisition, and you DO intend to supply more later



#### You finalise the Requisition if

1. You have supplied everything from the requisition or
2. You haven't supplied everything from the requisition, but you don't intend to supply any more later

#### Do not finalise the requisition if

You haven't supplied everything from the requisition, and you DO intend to supply more later.

This means once you finalise a requisition, you cant issue any more customer invoices from it.

Only finalize a requisition when you're sure you don't want to issue any more stock from it.

**Step 3:** Conclude the session by appreciating the participants.

## Session 2.2: Customer Invoices

### Objective:

By the end of this session, the participants should be able to:

1. Explain Customer invoice and step by step to generate it.

Time: 40 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Customer Invoice	Lecturette/ group demonstration	40 minutes

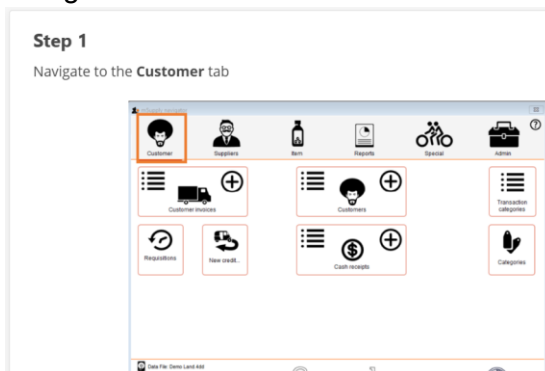
### Activity 1: Customer invoice

**Step 1:** Ask a volunteer from the participants to explain what Customer Invoice is all about. Use the note below as a guide.

*Trainers Note: Customer invoices are how we issue stock to customers. We've already seen how to generate a customer invoice from a requisition when our customer also uses mSupply.*

**Step 2:** Now lets look at step by step to create customer invoice.

1. Navigate to the **Customer** tab



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



## Step 2

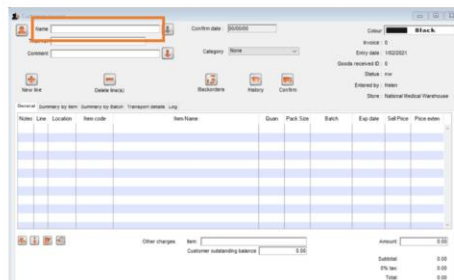
Click the **New Customer invoice** button



## 3. Search for the **customer name**

### Step 3

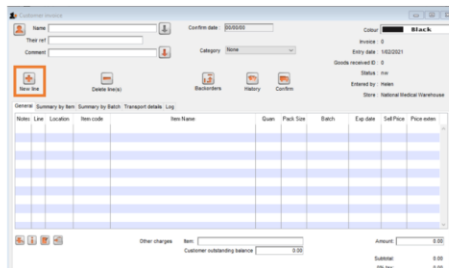
Search for the **Customer name**



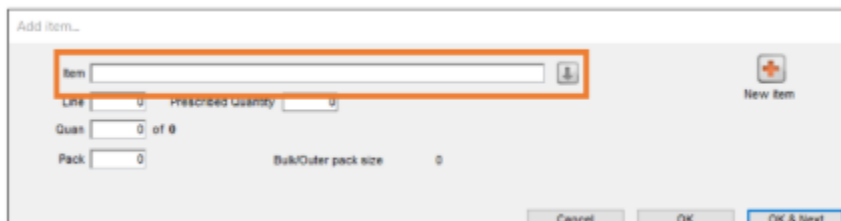
## 4. Click **New Line** to start adding items to the customer invoice

### Step 4

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



## 5. Search for the Item-



Remember you can search by

- Typing the first few letters of the Item name and pressing TAB
  - Typing the Item code and pressing TAB
  - Typing @ and pressing TAB
6. Select the batch Line you would like to issue

Edit line...

Item Amoxicillin 500mg tab amo500t

Line 1 Prescribed Quantity 300

Quan 300 of 98090

Pack 100 Bulk/Outer pack size 0

Add Place holder Re-lookup Sell Price

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

Total quantity issued 30000  
Total quantity available 9839000

Cancel OK OK & Next

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

- Enter the quantity to issue this is the total number of Packs so pay close attention to the pack size

In the example below, we are issuing 300 packs of pack size 100 to give a total of 30,000 tablets

Edit line...

Item Amoxicillin 500mg tab amo500t

Line 1 Prescribed Quantity 300

Quan 300 of 98090

Pack 100 Bulk/Outer pack size 0

Add Place holder Re-lookup Sell Price

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

- To add another line, click **OK and Next**

#### Step 8

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

Once you have finished adding items, click **OK** to return to the Customer invoice window

Edit line...

Item Amoxicillin 500mg tab amo500t

Line 1 Prescribed Quantity 300

Quan 300 of 98090

Pack 100 Bulk/Outer pack size 0

Add Place holder Re-lookup Sell Price

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

- To print a **picking slip**, check the print Slip, check the **Print** box and click **OK**

Notes	Line	Location	Item code	Item Name	Qty	Pack Size	Batch	Exp date	Unit Price	Price each
	1	AI	pac500	Paracetamol 500mg tab	300	100	165/000	21/05/2022	0.80	0.80
	2	BT	pac500	Paracetamol 500mg tab	100	100	165/000	26/05/2021	1.12	112.00
	3	CI	pac500	Paracetamol 500mg tab	100	100	165/000	21/05/2022	0.80	1.00
	4	AI	pac500	Paracetamol 500mg tab	400	1	165/000	26/05/2021	0.80	4.00

10. Facility staff pick the stock and prepare the order for delivery

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

#### Step 11

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



12. Click the **confirm** button

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

#### Step 13

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

**Step 3:** Remind participants that it is at this point that the stock is removed from their inventory.

**Step 4:** Ask a participant to explain what customer invoice transaction statuses. Use the note below as a guide.

Trainers Note:

1. Suggested (sg): Before confirming a customer invoice, you can still:
  - Close and open it again to make changes
  - Create picking slips

If the person picking the stock makes annotations on the picking slip, you can still make these changes in mSupply after the order has been put together.

2. **Confirmed (cn)**
  - The order is now picked and awaiting dispatch
  - It may be in loading area or waiting bay.

3. Finalized (fn)

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

## Session 2.3: Picking Slips

### Objective:

By the end of this session, the participants should be able to:

1. Explain and demonstrate the processes of picking slips.

Time: 40 minutes

### Session Outline/Activity

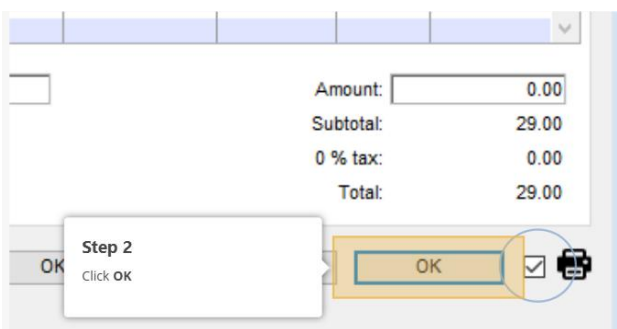
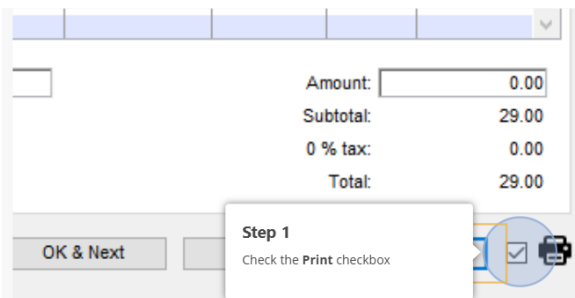
No.	Activity	Facilitation Method	Time Allotted
1.	Picking slips	Lecturette/ group demonstration	40 minutes

### Activity 1: Picking Slips

**Step 1:** Inform participants we're going to learn about the different picking slips formats available in mSupply and discuss some best practice tips when picking stock.

Trainers Note: Remind participants that Picking slips are printed from your Customer invoice **before** it is Confirmed

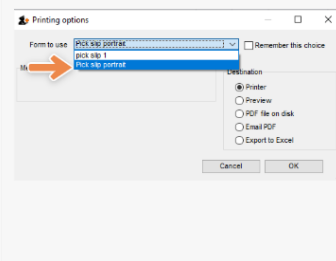
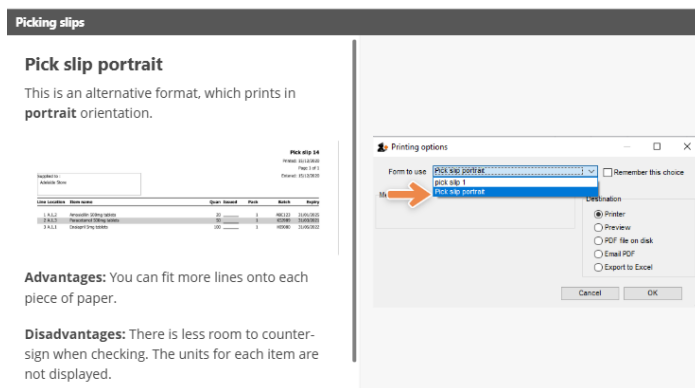
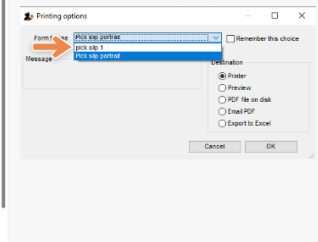
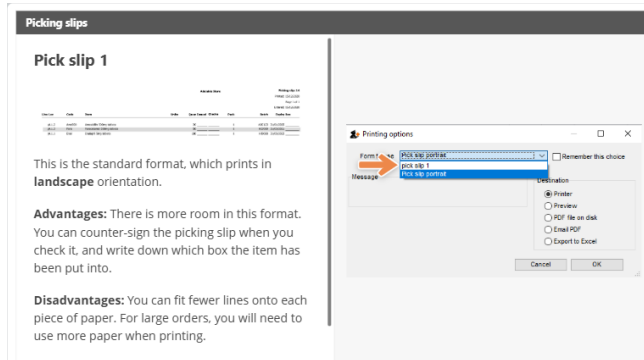
**Step 2:** Lets look at some steps to print a pick slip.



**Step 3:** Tell participants that we will be looking at Picking slip printing formats. Slides below.

Note: When you print a picking slip. You are presented with some options. There are two standard picking slip formats in mSupply- (portrait and landscape, they both have advantages and disadvantages as shown in the pictures below). You may have other options available at your facility

Ask a volunteer to read what is on the participant's guide and take questions for proper understanding.



**Step 4:** Inform participants that it is best to have SOP for this process, and go through a standard SOP for printing pick slips with them

1. **Train-** Staff should be trained and re-trained to carefully follow the picking slip
2. **Sort-** The picking slip should automatically sort itself by location to make picking stock easier.
3. **Select** – Select the correct batch in the correct quantity from the correct location.
4. **Annotate-** Annotate the picking picking slip if there are any problem or error. For example if an item is in the wrong location or there is insufficient stock of a chosen batch
5. **Sign-** Sign the picking slip for each item as it is 'picked' off the shelves. Gather all the items together on a bench or assembly area
6. **Double check-** The picking slip and packed order should be double checked and countersigned by another staff member. In smaller facilities, you may check your own work. Whatever the size of the facility, the packed order should always be double checked.

**Step 5:** Tell participants we Ready for dispatch!

Any annotations on the picking slip must be correct in the customer invoice. This may be done by:

- Opening the **Customer Invoices list**;
- Finding the relevant Customer invoice; and
- Making the changes

When everything is correct, Confirm the Customer invoice. A hard copy can be printed and placed in the boxes to be dispatched.

Trainers Note: Ask participants “At what point should a Customer invoice be Finalized?”



## Session 2.4: Cash Receipts

### Objective:

By the end of this session, the participants should be able to:

1. Explain and demonstrate the ability to create a receipt and print.

Time: 35 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Cash Receipt	Lecturette/ group demonstration	35 minutes

### Activity 1: Cash Receipt

**Step 1:** Ask participants if they receive cash or other monetary payments from their customers.  
Let's look at the introduction slide

Inform the participants that they will find this unit very useful if they receive cash, cheque or transfer as payment for commodity but if they don't they will still learn how to receive customer payments in mSupply though they may not use this functionality in practice.

Introduce the unit by telling reading this slide to them

#### Introduction

When a customer pays for items on a Customer invoice, you can record this payment in mSupply.

The Customer Invoice must:

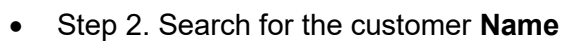
- Contain items with **Prices** attached to them; and
- Be **Finalised**



**Step 2:** Tell participants we will be looking at step by step.

- Step 1. Navigate to the **customer** tab, then click **New cash receipt** button  
Trainers note: Be sure to point out and confirm all participants can identify this on the screen





- Step 3: A list of all the customer's outstanding payments owed to you in the default receipt currency will appear

If the customer owes you money in more than one currency, select a different Receipt currency from the dropdown list to see lines owed in that currency

- Step 4: You can also view the customer's Total outstanding amount owed to you. This is also displayed by currency, and will be different for each currency

Entry date	Confirm date	Invoice	Ther ap	Comment	Total	Currency	Outstanding	Payment
1/02/2021	1/02/2021	3			135.5	USD	135.5	0
1/02/2021	1/02/2021	4			16	USD	16	0

- Step 5: Enter the amount you are receiving in the Receipt field. Remember to select the correct Receipt currency, if applicable

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

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

- Step 7: Enter the Amount the customer is paying for that customer invoice. This is usually the exact amount owing for that invoice, but partial payment may also be accepted.

- Step 8: The amount entered will now appear against the specific invoice line you selected, and the Total payment in the local currency field will update. Click OK to save the payment

Entry date	Confirm date	Invoice	Ther ref	Comment	Total	Currency	Outstanding	Payment
1/10/2021	1/10/2021	3			126.5 USD	USD	126.5	126.5
1/10/2021	1/10/2021	4			16 USD	USD	16	

The payment is finalized!

### The payment is Finalised!

Once you click **OK**, the payment is Finalised

You can still review the cash receipt, but it can no longer be edited



Trainers Note: Inform participants that though payment is finalized there are still few steps to take to review and probably print the receipt.

**Step 3:** We are not going to steps of reviewing and printing.

- Step 1: You can review previously entered payments by clicking the cash receipts list button.



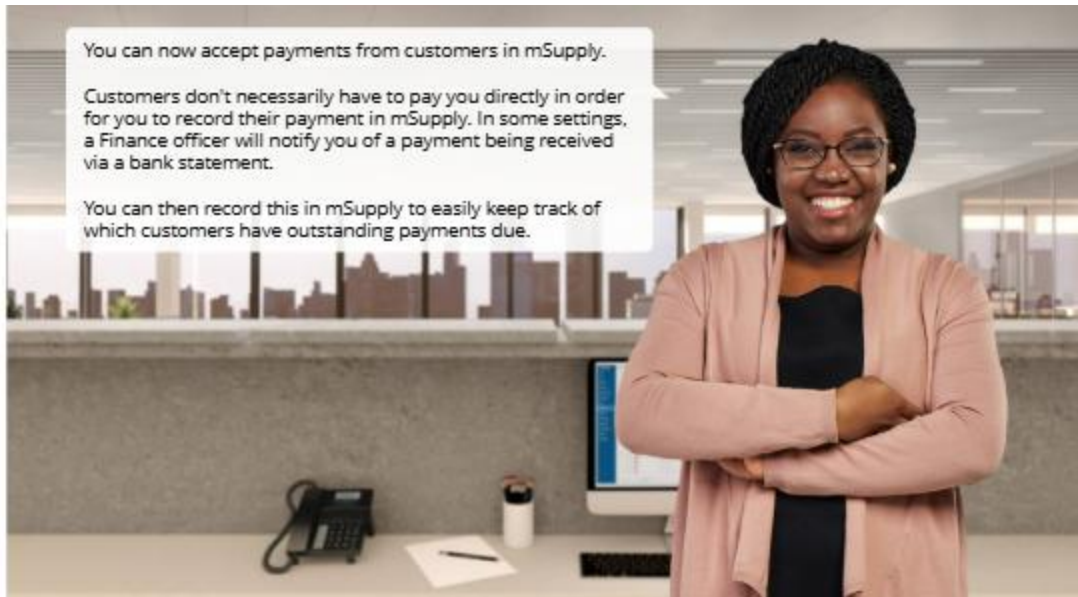
- Step 2: Double click a line to view the cash receipt.  
Note the status of cash receipt is finalized so they cannot be edited

Name	Type	No.	Entered	Confirmed	Invoiced	Total	Ther. ref	Pick-up cont.	Comment	Export
Karing Hospital	cc	15	1/6/2021	1/6/2021	2	16			Receipt to invoice(1)	8
Karing Hospital	cc	16	1/6/2021	1/6/2021	1	135.5			Receipt to invoice(2)	8

- Step 3: if you wish to print a receipt, check the **print** box before clicking **OK**

Entry date	Conf. date	Invoice	Ther. ref	Comment	Total	Currency	Outstanding	Payment
1/6/2021	1/6/2021	1			135.5	USD	0	135.5

Trainers note:  
Ask a volunteer to read the next slide.



## Session 2.5: Customer Credit

### Objective:

By the end of this session, the participants should be able to:

1. Explain and demonstrate how to receive returned items from customers.

Time: 35 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Customer Credit	Lecturette/ group demonstration	35 minutes

### Activity 1: Customer Credits


**Step 1:** Tell participants that sometimes your customers will need to return stock to you. The stock might be damaged, short-dated or they may have too much stock and want to avoid wastage. They may also have made a mistake on their orders!

Receiving returned stock from a customer can occur in two ways, depending on whether the customer also uses mSupply.

**Step 2:** Lets look at these scenarios

**Scenario A-** A customer that also uses mSupply

A customer that also uses mSupply



A customer that does NOT use mSupply

1. The customer should create a **Customer invoice**
2. This will appear at your store as a **Supplier invoice**
3. This allows for a **Stock transfer** to occur in mSupply, removing stock from the customer's store and transferring it back to the supplier's store

You've already learnt about Supplier invoices and Customer invoices, so we won't repeat that now

## Scenario B- A customer that does **NOT** use mSupply


A customer that also uses mSupply

**A customer that does NOT use mSupply**

The customer can't transfer the stock to you in mSupply, so you have two options:

- Enter a **Supplier invoice** manually; or
- Enter a **Customer credit** if you also wish to give the customer a financial credit

A customer that does NOT use mSupply



**Step 3:** Ask a volunteer to explain what it means to credit someone. Take few response and inform the Participants we will move on to learn how to create a customer credit-

- Step 1: Navigate to the Customer tab and click the New credit button



- Step 2: Find the Name of the customer returning the good- You can then record returned items in two ways; by either clicking **New line** or **History**

- Step 3: If you click **New line**, you must manually add each **Item** and its **Batch**, **expiry**, **Quantity** and **Cost**, then click **OK**

- Step 4: If you click History, you can see a list of items previously supplied to that customer.

You can select a single item or multiple items and specify the **Quantity** being returned, then click **Add to credit**

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



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

Buttons: Add to credit, OK

- Step 5: All items being returned are shown

When you are sure everything is correct, check the **finalize** box and click **OK**

You can also print a record of the credit by clicking the **print** box before clicking **OK**

Customer credit

Name: Kerang Hospital, Confirm date: 05/05/08, Colour: Black

Their ref: KWO, Category: None, Invoice: 0, Entry date: 5/02/2021

Comment: , Goods received ID: 0, Status: mw, Entered by: Helen, Store: National Medical Warehouse

Buttons: New line, Delete line(s), History

Notes	Line	Location	Item code	Item Name	Quan	Pack Size	Batch	Exp date	Sell Price	Price exten
	1	B1	ceb250	Ceftriaxone 250mg inj	100	10	kgj0900	28/02/2027	1.12	-112.00
	2	C1	ibu200	Ibuprofen 200mg tab	50	100	HG5J64563	31/01/2023	0.02	-1.00
	3	A1	pa500	Paracetamol 500mg tab	450	1	j00900	30/04/2026	0.01	-4.50
	4	B1	pi750	Primaquine diphosphate 7.5mg tab	200	1	Hkj0900	31/06/2024	0.04	-8.00

Other charges: Item: , Amount: 0.00

Customer outstanding balance: 0.00

Subtotal: -125.50, 6% tax: 0.00, Total: -125.50

Buttons: Finalize, OK & Next, Delete, OK, Print

Before opening the next slide, ask a volunteer to tell the class what happens if the returned commodity is unusable (Damaged, expired or just unsuitable for use)

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

If the returned stock is damaged, expired or otherwise unsuitable for use, you must remove it from your inventory.

You'll learn about Stocktakes and Inventory Adjustments in another level.



**Step 3:** Explain to the participants that if no money changes hands between you and your customers and you don't receive payments against invoices, you can skip this step in your facility. However, we will run through it now so we can learn and continue the course.

**Step 4:** Lets look at the steps.

- Step 1: Navigate to the Customer tab, then click the New Cash receipt button.



- Step 2: Find the customer's Name

All outstanding payments and credits will appear

- Outstanding invoices are positive numbers
- Credits are negative numbers

In the example below, there is a \$125.5 credit, and we'll use this to pay for the outstanding invoice line of \$120

Cash receipts

Name: Kerang Hospital KH0 Entered by: Helen Invoice No.: 0

Cheque #: Entered date: 5/02/2021 Status: n/w

Note: Confirm date: 5/02/2021 Store: National Medical

Receipt currency: USD Currency rate: 1.00

Receipt: 0.00

Distribute Disabled lines below are in a different currency

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

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

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

Total payment in local currency: 0.00

OK & Next Cancel OK

- Step 3: Double click the credit line

Cash receipts

Name: Kerang Hospital KH0 Entered by: Helen Invoice No.: 0

Cheque #: Entered date: 5/02/2021 Status: n/w

Note: Confirm date: 5/02/2021 Store: National Medical

Receipt currency: USD Currency rate: 1.00

Receipt: 0.00

Distribute Disabled lines below are in a different currency

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

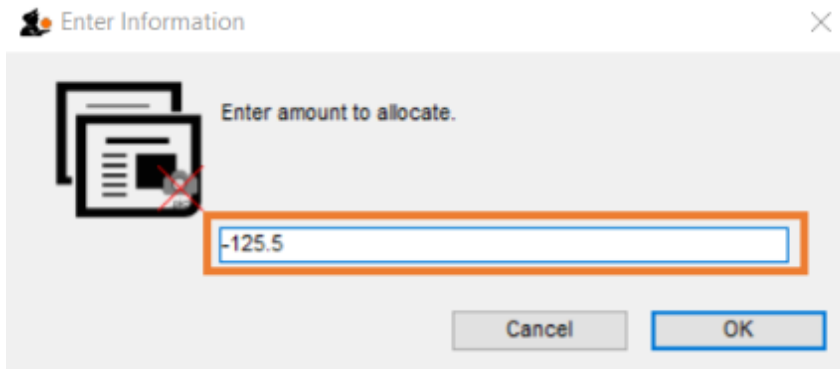
Double-click lines to enter payment amount  
Hold down shift to allocate whole invoice amount

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

Total payment in local currency: 0.00

OK & Next Cancel OK

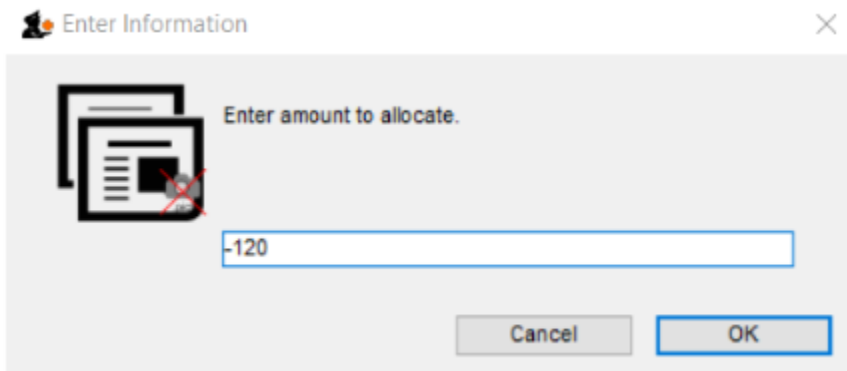
- Step 4: The credit value is shown as below



The screenshot shows a dialog box titled "Enter Information" with a close button (X) in the top right corner. On the left, there is an icon of two overlapping documents with a red 'X' over the top one. To the right of the icon, the text "Enter amount to allocate." is displayed. Below this text is a text input field containing the value "-125.5". The input field is highlighted with a blue border. At the bottom of the dialog, there are two buttons: "Cancel" and "OK".

Enter the amount to allocate to another invoice

In this case, we'll enter \$120, as this is the amount owing on the outstanding invoice line  
Make sure this value remains a negative number, as it is a credit



The screenshot shows a dialog box titled "Enter Information" with a close button (X) in the top right corner. On the left, there is an icon of two overlapping documents with a red 'X' over the top one. To the right of the icon, the text "Enter amount to allocate." is displayed. Below this text is a text input field containing the value "-120". The input field is highlighted with a blue border. At the bottom of the dialog, there are two buttons: "Cancel" and "OK".

- Step 5: In the bottom right corner, the amount to allocate to outstanding invoices is shown (in this case, \$120)

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

[illegible]

- Step 6: Enter the amount to pay against that invoice line

In this case, we will pay off the full \$120 but you can also make partial payment against invoices if you have insufficient credit

Enter Information

Enter amount to allocate.

120

Cancel OK

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

The **Total outstanding** balance is shown (-\$5.50 in the example), and this will remain available to credit against future invoices

Click **OK** to finalise the payment

**Cash receipts**

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

Disabled lines below are in a different currency

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

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

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

Total payment in local currency: 0.00

OK & Next Cancel **OK**

## Summary

Once you click **OK**, the payment is Finalised

The credit has been used to pay for the outstanding invoice



**Step 5:** Get a volunteer to go through this process till you are convinced participants are able to practice it with minimal assistance.

**Step 6:** supervise the class while they go through the learning checks and score the passing mark

## Session2.6: Dispensary Mode vs. Store Mode

### Objective:

By the end of this session, the participants should be able to:

1. Describe and differentiate between dispensary mode and store mode.

Time: 30 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Dispensary Mode vs. Store Mode	Lecturette/ group demonstration	30 minutes

#### Activity 1: Dispensary Mode vs. Store Mode

**Step 1:** Inform the participants that mSupply store is set up either as a store mode or Dispensary mode. The slide below explain further.

#### Introduction

Each mSupply store is set up in one of the following modes:

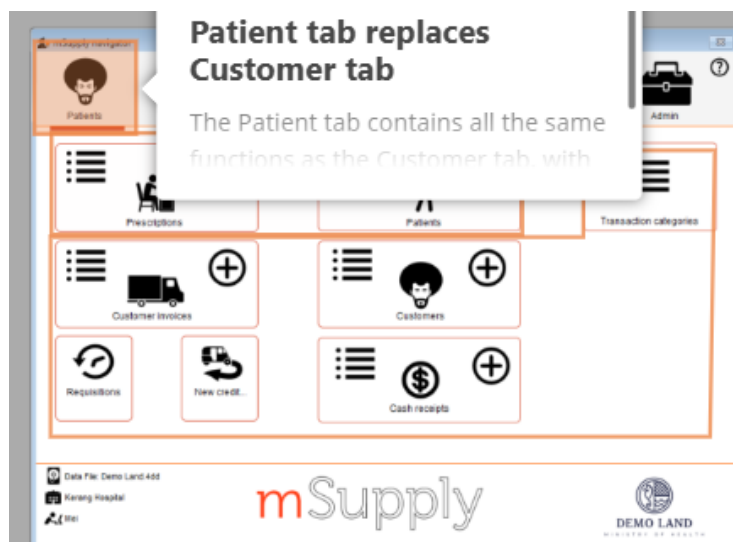
- **Store mode** is used at facilities that do NOT dispense items to individual patients, like warehouses or second-level medical stores.
- **Dispensary mode** is used at facilities that dispense items to individual patients, like pharmacies, clinics, and hospital dispensaries.

Let's see how Dispensary mode differs to Store mode.



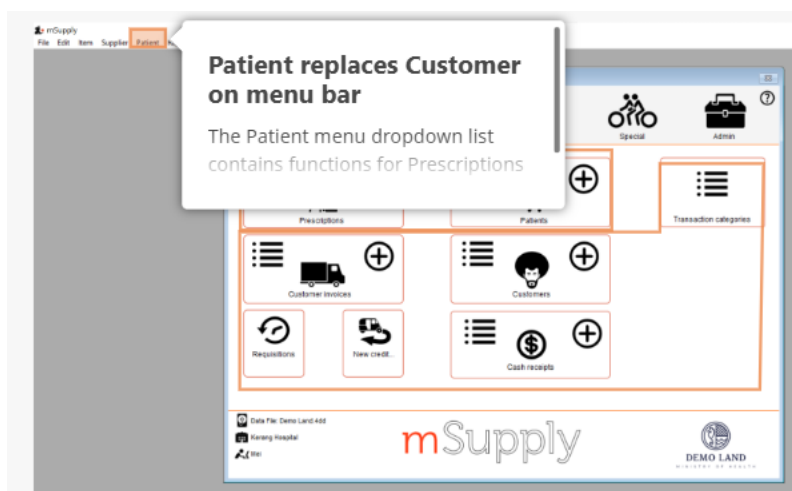
**Step 2:** tell participants that we will looking at dispensary mode differ to store mode. The slide gives us more details.

Note: **Patient tab replaces Customer tab-** The patient tab contains all the same function as the customer tab, with a few extra buttons that allow you to dispense prescriptions



## 1. Patient replaces Customer on the menu bar

The patient menu dropdown list contains functions for prescriptions



## 2. New prescriptions and patients buttons

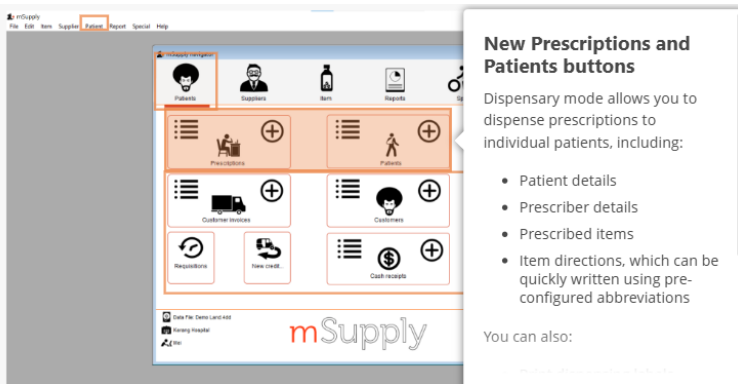
Dispensary mode allows you to dispense prescriptions to individual patients; including:

- Patient details
- Prescription details
- Prescribed items
- Item directions, which can be quickly written using pre-configured abbreviations.

You can also:

- Print dispensing labels
- Track patient dispensing histories and warnings like allergies
- Record prescription payments
- Set up drug interaction alerts

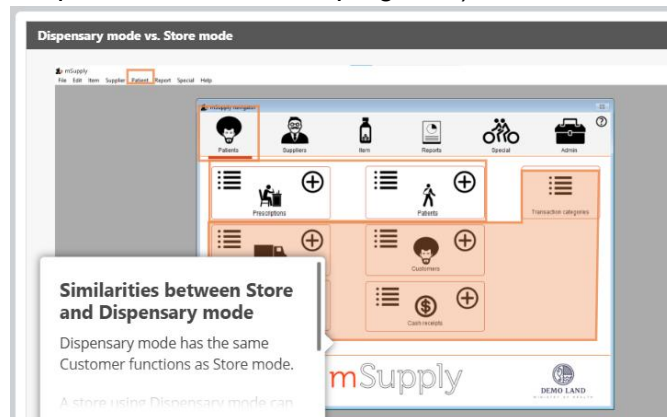




### 3. Similarities between store and dispensary mode

Dispensary mode has the same customer functions as store mode.

A store using Dispensary mode can distribute stock to both patients and customers (e.g. hospital wards, outreach programs). And can still handle customer requisitions.



**Step 3:** Ask another volunteer to read through the summary and be sure they all understand the differences and similarities.

### Summary

A facility using Dispensary mode can perform all the same functions as one using Store mode, with the added ability to dispense items to individual patients.

Remember to take a look at your mSupply navigator to identify whether your store uses Store mode or Dispensary mode.



## Session 2.7: Prescribers

### Objective:

By the end of this session, the participants should be able to:

1. Describe and how to add and edit prescribers in mSupply.

Time: 15 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Prescribers	Lecturette/ group demonstration	15 minutes

### Activity 1: Prescribers

**Step 1:** Inform participants that we will look at Prescriber. Ask participants to explain who a prescriber is.

Note: Appreciate the effort of any responder before asking them to read the next slide



**Step 2:** Lets see how to add and edit Prescriber in mSupply.

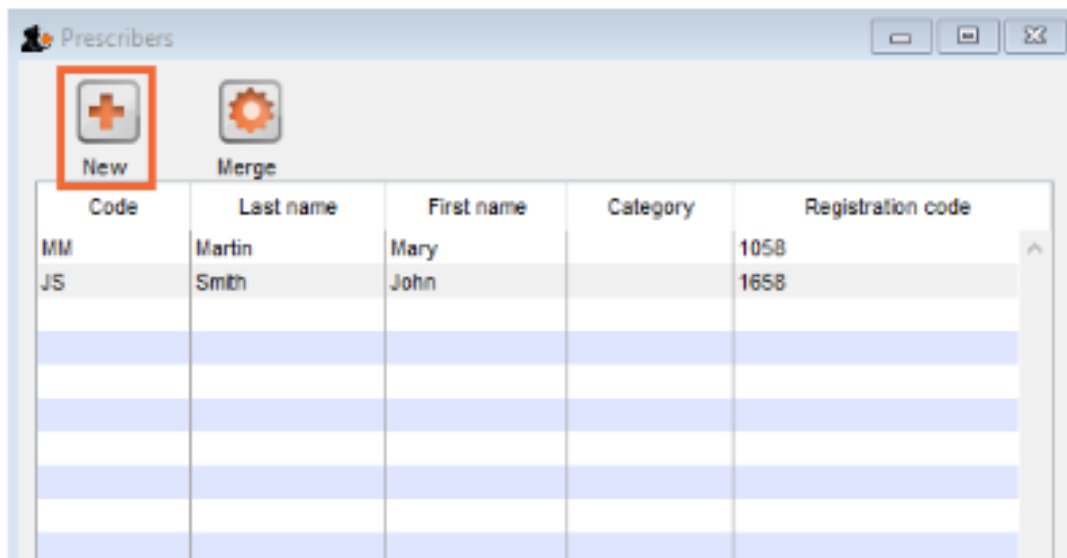
- Step 1- Navigate to the special tab and click the **Prescribers** button




- Step 2: A list of prescribers in your store will open

You can:

- Edit a prescriber's details by double-clicking on their name; or
- Add a new Prescriber by clicking the new button



- Step 3: Enter the prescriber's **code**, **last Name**, **First Name**, and **Initials**, then click **OK**  
All other fields are optional

 Add / edit prescribers ✕

Active ☒ Inactive ☐

Code

Last name

First name

Initials

Address 1

Address 2

Phone

Mobile

email

Registration code


Category



☐ Female ☒ Male

## Summary

### The new prescriber has been added

You can also add a new Prescriber in the prescription dispensing window, but you'll learn about that later!

 Prescribers ⏮ ⏭ ⏹

New Merge

Code	Last name	First name	Category	Registration code
MM	Martin	Mary		1058
JS	Smith	John		1858
TJ	Jones	Tom		

## Session 2.8: Patients

### Objective:

By the end of this session, the participants should be able to:

1. Describe and find and edit patients who are already entered in mSupply.

Time: 15 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Patients	Lecturette/ group demonstration	15 minutes

### Activity 1: Find and Edit Patient

**Step 1:** In this session we will looking at how to find and edit patient who are already entered in mSupply.

**Step 2:** Lets look at the steps together. As k for a volunteer to read each slide while the trainer explain.

- Step 1: Navigate to the Patients tab and click the patient list button.



- Step 2: Search for the patient by Last name, First Name and/or Code and click Find.

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

- Step 3: Double-click on the patient name that you want to view or edit

- Step 4: Edit the patients details as required, then click **OK**

Trainers Guide Legacy mSupply

**Step 3:** Tell participants that after the 4<sup>th</sup> Slides, the patient details have been saved.

**Step 4:** Lets see what kind of information mSupply stores in the Patient details window. The steps are below.

## 1. General

### General

This tab contains general personal information about the patient such as **Name**, **Date of Birth** and **Address**.

If the **Hold: do not issue** box is checked, then no stock can be dispensed to the patient.

The **Credit limit** is the maximum negative value a patient's account can have: when they reach this limit, they will not be able to have a prescription dispensed without paying for it.

The screenshot shows the 'Edit patient' window with the 'General' tab selected. The 'Name' field contains 'Chalmers, Susan'. The 'Code' field contains 'J-1000'. The 'User' field contains 'J-1000'. The 'Sex' field is set to 'Female'. The 'Date of birth' field contains '27/01/1985' and the 'Age' field contains '35'. The 'Price Category' is set to 'A'. The 'Restrictions' section has the 'Hold do not issue' checkbox checked. The 'Credit limit' is set to '0 USD'.

## 2. Prescriptions

### Prescriptions

This tab shows each prescription dispensed for the patient.

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

Double-click a line to open that prescription.

The screenshot shows the 'Edit patient' window with the 'Prescriptions' tab selected. The patient name is 'Chalmers, Susan'. The 'Filter' is set to 'All'. The table below shows the list of prescriptions:

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

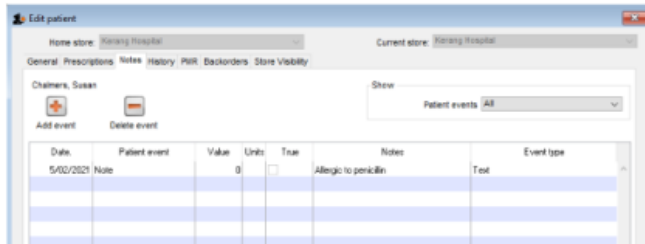
### 3. Notes

#### Notes

Click **Add event** to add a note to the patient's profile.

**Notes** are displayed each time you dispense a prescription to the patient.

These can be used to remind you of patient allergies to medicines, or preferences for certain dosage forms.



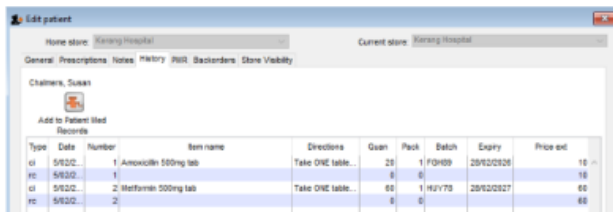
### 4. History

#### History

This tab shows a list of all the individual items previously dispensed to the patient in mSupply.

Double-click an item to open the prescription where it was dispensed.

Highlight a line and click **Add to Patient Med Records** to add it to the **PMR**.



### 5. Patient Medication Record (PMR)

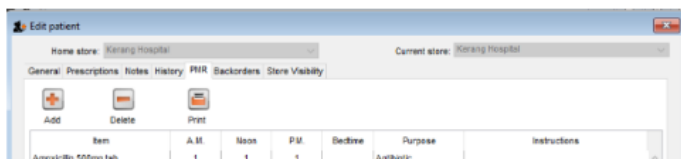


## PMR

This is the **Patient Medication Record**, which can be printed and given to the patient as a simple summary of all their medications, dosages, and instructions for use.

Items dispensed in mSupply can be added from the **History** tab.

You can also click the **Add** button to record other medicines a patient is taking (e.g. items dispensed from another pharmacy or over-the-counter items).

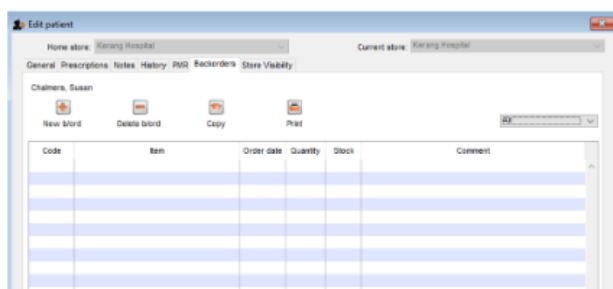


## 6. Backorders

### Backorders

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

This function is rarely used in mSupply. If you are using this feature and you have any backorders for a patient, they will show here.

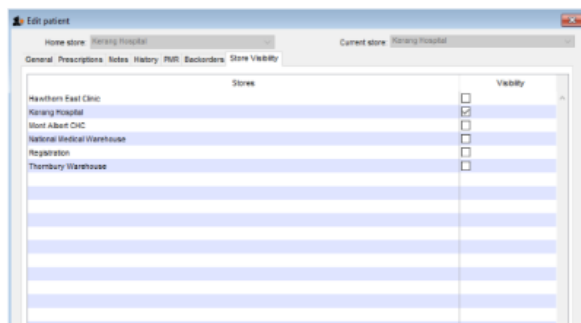


## 7. Store Visibility

## Store Visibility

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

Visibility preferences are set by Administrators.



The screenshot shows a web application window titled "Edit patient". At the top, there are tabs for "Home store" (Korangi Hospital) and "Current store" (Korangi Hospital). Below these are navigation tabs: "General", "Prescriptions", "Notes", "History", "PHU", "Backorders", and "Store Visibility". The "Store Visibility" tab is active, showing a table with two columns: "Stores" and "Visibility". The table lists several stores with checkboxes in the "Visibility" column.

Stores	Visibility
Heathorn East Clinic	<input type="checkbox"/>
Korangi Hospital	<input checked="" type="checkbox"/>
West Albert CHC	<input type="checkbox"/>
National Medical Warehouse	<input type="checkbox"/>
Registration	<input type="checkbox"/>
Thornbury Warehouse	<input type="checkbox"/>

**Step 5:** Conclude the session by appreciating all participants

## Session 2.9: Dispensing Prescriptions

### Objective:

By the end of this session, the participants should be able to:

1. Describe and demonstrate how to dispense prescription.

Time: 15 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Dispensing Prescription	Lecturette/ group demonstration	35 minutes

### Activity 1: Dispensing prescription

**Step 1:** Explain to participants that prescription are instruction written by a prescriber authorizing a patient to be provided with a medicine or medical device and this can be recorded in mSupply.

**Step 2:** Lets look at steps involve in dispensing precriptions using mSupply.

- Step 1. Navigate to the patients tab and click the new Prescription button

#### Step 1

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



- Step 2: Enter the patient name

## Step 2

Enter the patient **Name**

You can:

- Type the first few letters of patient's surname and press TAB; or
- Type \*patient code and press TAB; or
- Type @ and press TAB to choose from a list of ALL patients

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

To avoid duplicates, always check if a patient is already in mSupply before creating a new profile

- Step 3: Enter the **Prescriber**

## Step 3

Enter the **Prescriber**

You can:

- Type the first few letters of prescriber's surname and press TAB; or
- Type prescriber code and press TAB; or
- Type @ and press TAB to choose from a list of ALL prescribers

If the prescriber cannot be found, type @ and press TAB to open the prescriber list, then click **New**

- Step 4: Enter the **prescription Data** (This will automatically default to today's date)

## Step 4

Enter the **Prescription Date** (this will automatically default to today's date)

- Step 5: Click **New line** to start adding items to dispense, then search for an **Item**

## Step 5

Click **New line** to start adding items to dispense, then search for an **Item**

You can:

- Type the first few letters of item name and press TAB; or
- Type the item code and press TAB; or
- Type @ and press TAB to choose from a list of ALL items

- Step 6: If more than one item matches your search, a list of those items is shown

## Step 6

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

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

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

Item list.

Item name	Item code	Item unit	Stock on Hand
Amoxicillin 500mg tab	am500a		400
Amoxicillin 250mg tab	am250a		0
Chloroquine phosphate 100mg (base) tab	chl100t		0
Chloroquine phosphate 50mg/5mL syrup	chl50s		0
Diazepam 5mg tab	diaz5t		0
Ibuprofen 200mg tab	ibu200t		0
Isoniazid 300mg tab	iso300t		0
Mefloquine 250mg tab	mef250t		0
Metformin 500mg tab	mef500t		9940
Metronidazole 500mg/100mL inj	mef500i		0
Paracetamol 500mg tab	par500t		0
Primidone phosphate 7.5mg tab	pr75t		0
Rifampicin 150mg + isoniazid 150mg tab	rtia1t		0
Rifampicin 150mg + isoniazid 75mg tab	rtia7t		0
Rifampicin 150mg tab/cap	rtf150t		400

- Step 7: The Line number displayed shows you which batch you are dispensing, with all available lines shown in the table below.

### Step 7

The **Line** number displayed shows you which batch you are dispensing, with all available lines shown in the table below

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

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

- Step 8: Enter the **quantity** to issue, paying close attention to the **pack size**,

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

The **Total quantity issued** = Quantity x Pack size, and is shown below the table

- Step 9: Enter the **Directions** for use

### Step 9

Enter the **Directions** for use

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

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

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

- Step 10: You can also add items from the patients dispensing history by clicking the **History** button

## Step 10

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

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

The item will now show on your prescription entry window

The screenshot shows the 'Prescription Entry' window. The 'Patient details' section includes fields for Name (Chalmers, Susan), New Patient (checked), Code (AG090), Prescriber (Martin, Mary), and Code (MM). The 'Confirm date' is 00/00/00 and the 'Prescription date' is 00/00/00. Below these are buttons for 'New line', 'Delete line(s)', 'Backorders', 'History' (highlighted with a red box), and 'Repeats'. Below the buttons is a table titled 'History for Chalmers, Susan' with columns: Date, Number, Prescriber, Exp, Quantity, and Directions. The table contains three rows of data, with the first row highlighted in blue. At the bottom of the window is a 'Print' button.

- Step 11: Review the prescription entry window carefully.

## Step 11

Review the prescription entry window carefully

You can double-click a line to edit it, or remove a line by highlighting it and clicking **Delete line(s)**

Check the **Print** box and click **OK** to print labels

The screenshot shows the 'Prescription Entry' window. The 'Patient details' section includes fields for Name (Chalmers, Susan), Date of birth (27/04/1905), Address (123 Main Road), and Phone. The 'Prescriber' is Martin, Mary, and the 'Code' is MM. The 'Confirm date' is 00/00/00 and the 'Prescription date' is 00/00/00. Below these are buttons for 'New line', 'Delete line(s)', 'Backorders', 'History', and 'Repeats'. To the right of these buttons are fields for 'Reference', 'Category' (NOM), and 'Rate'. Below the buttons is a table titled 'Items Payment Log' with columns: Line, Location, Item Name, Qty, P/L, Batch, Exp date, Sell Price, and Price order. The table contains one row of data, with the first row highlighted in blue. At the bottom of the window is a 'Print' button.

- Step 12: prepare the patients medications and attach the dispensing label

## Step 12

Prepare the patient's medications and attach the dispensing labels



- Step 13: When you hand the dispensed items to the patient, reopen the prescription by finding it in the **prescription list**

## Step 13

When you hand the dispensed items to the patient, reopen the prescription by finding it in the **Prescriptions list**





- Step 14:

## Step 14

After opening the prescription, confirm all details are correct

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

The screenshot shows the 'Prescription Entry' window. Patient details include Name: Chalmers, Susan; Date of birth: 27/01/1965; Address: 123 Main Road; Store: Kierang Hospital. The 'New Patient' section shows Code: A5890. The 'Prescription' section shows Prescriber: Martin, Mary; Confirm date: 18/02/2021; Prescription date: 06/02/2021. The 'Items' table has one row: Line 1, Location, Item Name: Amoxicillin 500mg tab, Quan: 20, Pa: 1, Batch: FGH99, Exp date: 28/02/2026, Sell Price: 0.50, Price exten: 10.00. The 'Payment' tab is selected, showing a total amount of 0.00.

**Step 3:** At this point the patient items have been dispensed, stock has now been moved from your inventory, and patients dispensing history has been updated

**Step 4:** Now tell participants we will looking at steps involved when patient pay for prescription.

### Step 1

After opening the patient's prescription, click the **Payment** tab

The screenshot shows the 'Prescription Entry' window with the 'Payment' tab selected. The 'Items' table is visible, and the 'Payment' section at the bottom shows a total amount of 0.00.

### Step 2

View the **Total to pay**

The screenshot shows the 'Prescription Entry' window with the 'Payment' tab selected. The 'Total to pay' is displayed as 10.00. The 'Payment details' section shows 'Total payment' as 10.00 and 'Amount given' as 0.00.

### Step 3

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

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

The screenshot shows the 'Prescription Entry' window with the 'Payment' tab selected. The 'Amount given' is entered as 5.00, and the 'Change to give back' is calculated as 5.00.

### Step 4

Click **OK**

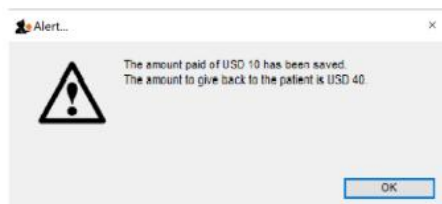
If you want to print a receipt for the patient, check the **Print Receipt** box before clicking **OK**

The screenshot shows the 'Prescription Entry' window with the 'Payment' tab selected. The 'Print Receipt' box is checked, and the 'OK' button is highlighted.

## Step 5

The patient's payment is acknowledged

Click **OK**



**Step 5:** Conclude this session by informing the participants that the patient's payment has been recorded.

## Session 2.10: Prescription Repeats

### Objective:

By the end of this session, the participants should be able to:

1. Explain and demonstrate how to enter repeated prescription.

Time: 15 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Entering repeated prescription	Lecturette/ group demonstration	35 minutes

### Active 1: Entering repeated prescription

**Step 1:** Start by explaining what repeated prescription is. Tell participants that if a prescriber authorizes repeat, this means the patient can be supplied with the prescribed item multiple times.

**Step 2:** Lets look at steps involved. The link below will provide more details.

[https://learn.msupply.foundation/pluginfile.php/1249/mod\\_scorm/content/1/res/data/video2.mp4](https://learn.msupply.foundation/pluginfile.php/1249/mod_scorm/content/1/res/data/video2.mp4)

**Step 3:** Appreciate participants for their time

## Session 2.11: Prescription Warnings and Interactions

### Objective:

By the end of this session, the participants should be able to:

1. Explain prescription interaction and effect on patient.


Time: 15 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Understanding Prescription warnings and interactions	Lecturette/ group demonstration	15 minutes

### Activity 1: Understanding Prescription warnings and interactions

**Step 1:** Read this slide to participants and explain further



mSupply can be set up to warn you if you dispense an item that might interact with the patient's other medications.

You can also record patient-specific warnings such as medication allergies. These stay attached to a patient's profile, and can be reviewed whenever somebody is dispensing a medication to them.

Recording allergies and reviewing medication interaction alerts are important for patient safety.

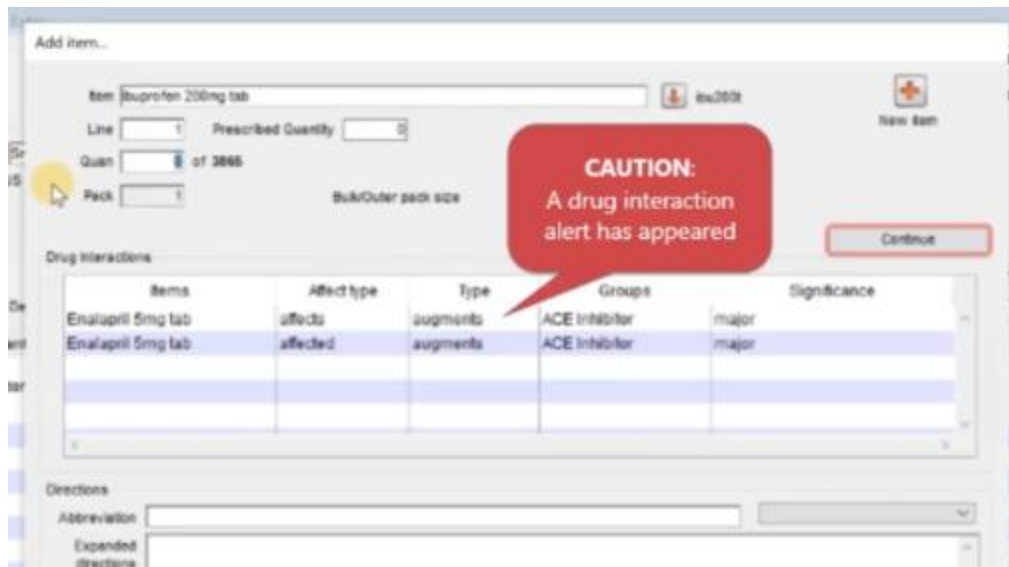
1 What is a medication interaction?

Ask participants "What is a medication interaction?"  
Allow a few attempts, appreciate them all and show the next slide

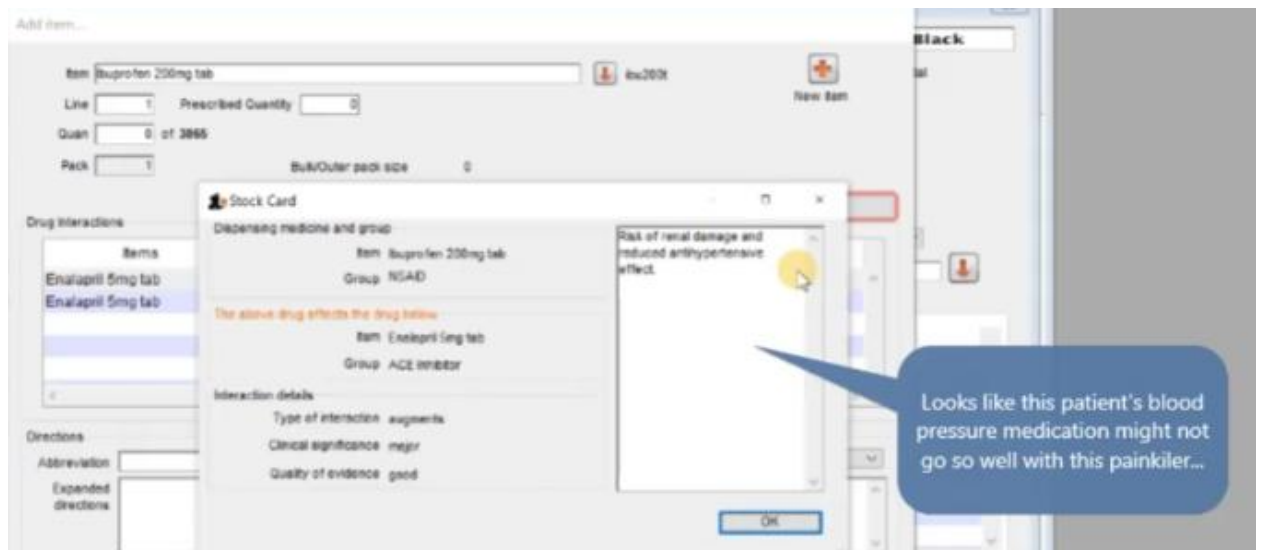


Get a participants to read through the steps

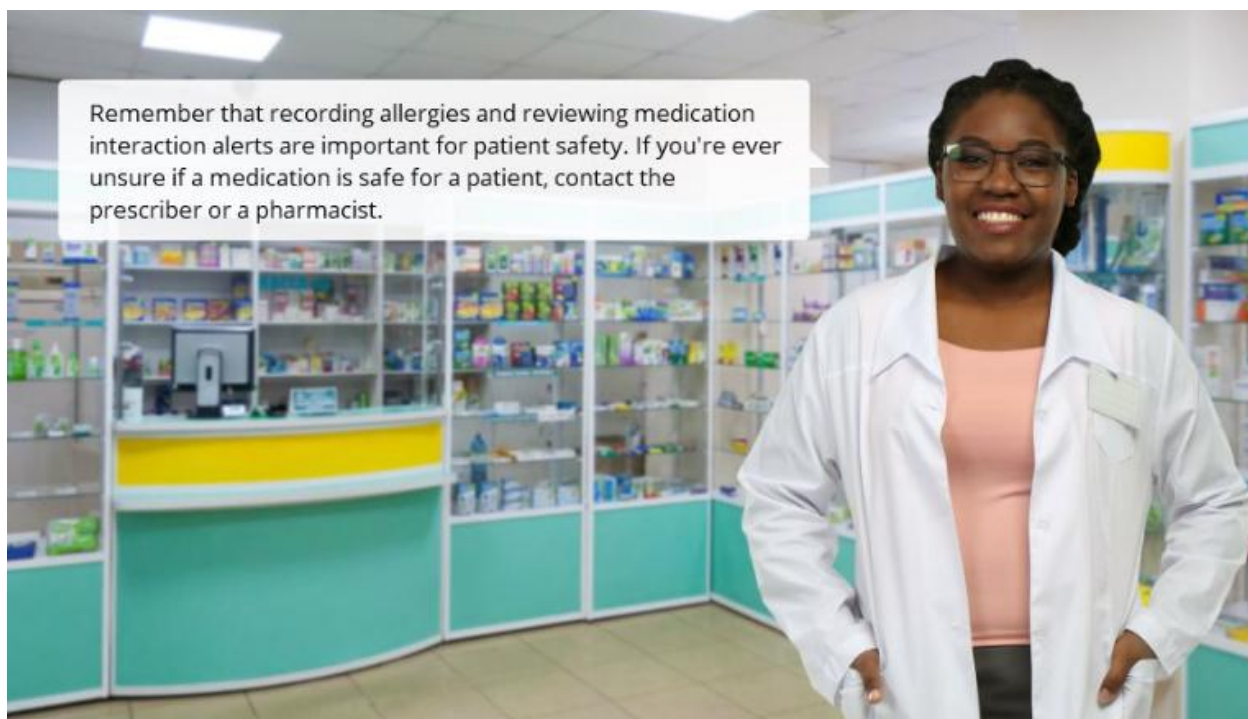
- Create a prescription in the usual process (Confirm again that all participants remember the steps)
- Click the **New note** button to record the patient's allergy
- Enter details of the patient's allergy
- Specify if you want this note to display whenever new Prescription is created
- If you select Never, it will still display at the bottom of every prescription
- Click Ok to save the note
- The note is displayed here for all future prescriptions
- Let's dispense those medications (Ibuprofen)
- Caution: A drug interaction alerts has appeared as shown below.



- Double click the interaction alert to learn more as shown below



Inform the class they must confirm if it is okay to go ahead with the dispensing.  
 Read the final slide and be sure it is well understood.



Guide participants through the Learning Checks



# LEGACY LEVEL 3





## Course Structure

This course is organized into the following sessions:

S/N	Session Title	Time Allocated
1.	Location	15 minutes
2.	Moving STOCKS	30 minutes
3.	Repacking Stocks	30 minutes
4.	Stocktakes - General	35 minutes
5.	Stocktake - Program	15 minutes
6.	Inventory Adjustment	30 minutes
7.	Knowledge check	10 minutes
8.	Build	40 minutes
9.	Miscellaneous Labels	30 minutes
10.	Learning check	10 minutes
11.	Basic Reports - Transaction	60 minutes
12.	Basic Reports – Stock and Items	60 minutes
13.	Basic Report – Expiring Items	25 minutes
14.	Basic Report- Requisition	45 minutes

## Session 3.1: Locations

### Objectives:

By the end of this session, the participants should be able to:

1. Define locations
2. Demonstrate how to view and set up locations

Total Time: 15 minutes

S/N	Activity	Learning Methods	Time Allocated
1.	Definition of Locations	Lecture	3 minutes
2.	How to View and Set up Locations	Interactive lecturette	12 minutes

### 1. Activity 1: Definition of Locations – 3 minutes

**Step 1:** Begin by welcoming the participants to the session, and then briefly go over the learning objectives.

**Step 2:** Define Locations.

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

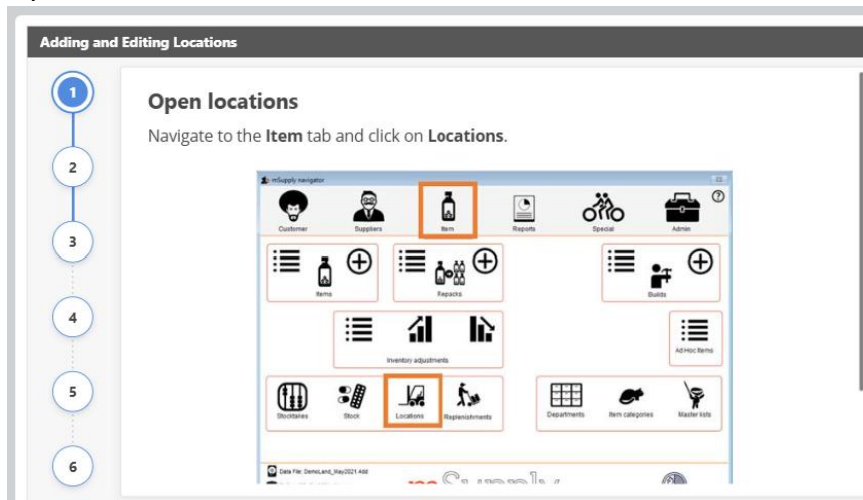
### Activity 2: How to View and Set up Locations – 7 minutes

**Step 1:** Inform participants that setting up Locations in *mSupply* will help to keep track of stock as it gets moved around, which will save you time when picking stock or doing a stocktake. A large store like a central warehouse might have several thousand locations set up, while a small store may only have a few locations.

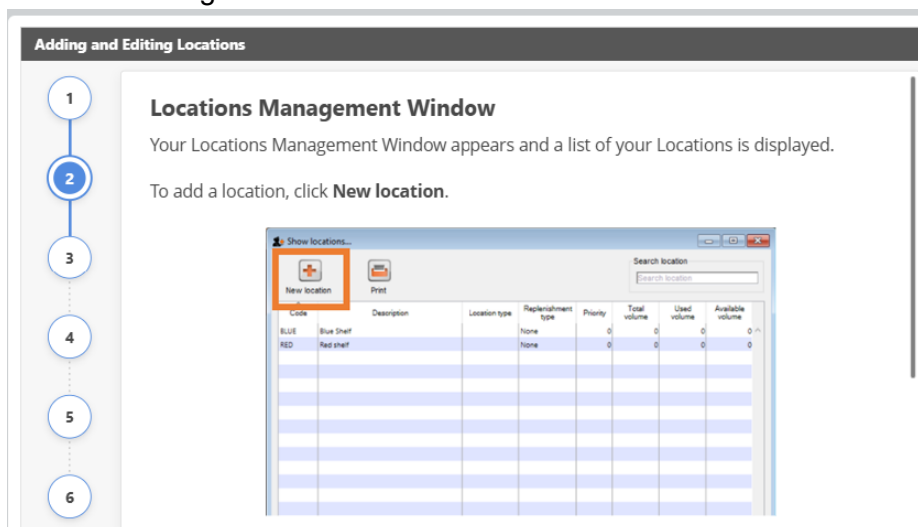
**Step 2:** Let's look at how to view and set up locations step by step. Please pay attention.

**Step 3:** Go over the process with the participants in the following steps:

## 1. Open Locations:



## 2. Location Management Window



## 3. Adding a new Location

### Adding and Editing Locations

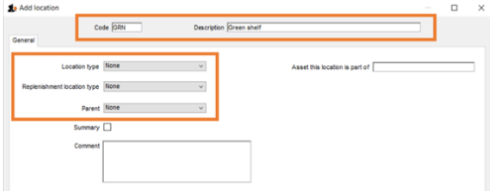
- 1
- 2
- 3
- 4
- 5
- 6

#### Adding a new location

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

A **code** is how you refer to a location in mSupply and what you will select when entering an item's location.

The **description** of the location will help you identify the location in real-life.



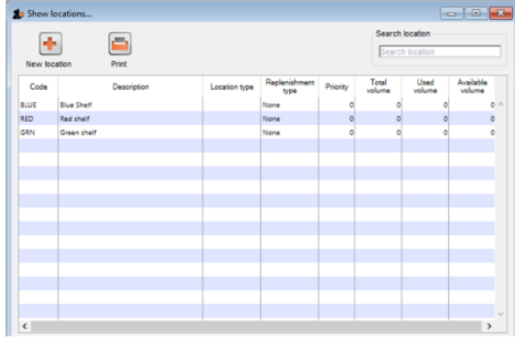
#### 4. Well done

### Adding and Editing Locations

- 1
- 2
- 3
- 4
- 5
- 6

#### Well done!

You've added a new location!



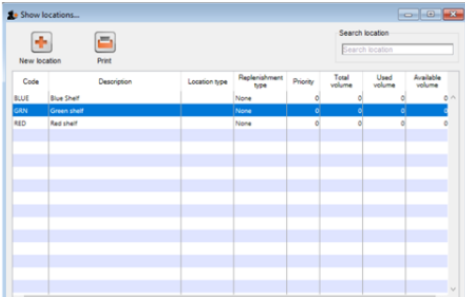
#### 5. Editing or deleting a location

### Adding and Editing Locations

- 1
- 2
- 3
- 4
- 5
- 6

#### Editing or deleting a location

To edit or delete a location, open **Locations** again and double click on the location you wish to change.



## 6. Edit or delete

**Adding and Editing Locations**

**1**

**2**

**3**

**4**

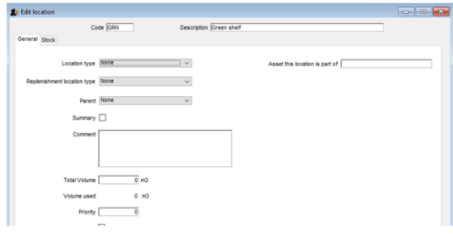
**5**

**6**

**Edit or delete**

Edit any details needed, then click **OK** (or **OK and next** if editing multiple lines).

To delete a location, click **Delete**.



**Step 4:** Now you also know how to edit and delete locations. Great work.

**Step 5:** Emphasize that they should remember to set the location of stock when receiving stock; otherwise, doing it later will take much longer.



## Session 3.2: Moving Stocks

### Objectives:

By the end of this session, the participants should be able to demonstrate the step-by-step process of moving stock

Total Time: 30 minutes

S/N	Activity	Learning Methods	Time Allocated
1.	Brief Introduction	Lecture	5 minutes
2.	The Process of Moving Stocks	Interactive lecturette	25 minutes

### 1. Activity 1: Brief Introduction – 5 minutes

**Step 1:** Explain that we have set up a location in the previous session, and we can move stock around our stock. Moving stock around our store is one of the most common things we do. mSupply will record the movement of stock so you can track the history of the item and see who moved things around.

### 2. Activity 2: The Process of Moving Stocks – 25 minutes

**Step 1:** Inform the participants that we will open the item details window for the item we want to move. Let's see how this is done step by step. Please pay attention.

1. Open the item list.

1

2

3

4

## Moving Stock

### Open the Item List

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

## 2. Search for the item you want to move

1

2

3

4

## Moving Stock

### Search for the item you want to move

Search for the item, then click **Find**.

Note that the default search is by **Item Name**, but you can change this to **Item Code**. There are many filters to help you search if you are unsure of the name (e.g. **Starts With**, **Contains**).

## 3. Select the item you want to move

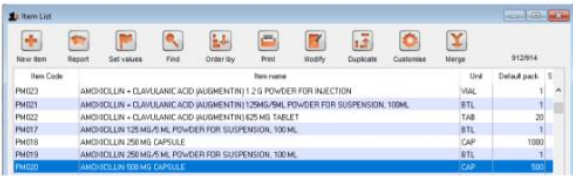


## Moving Stock

- 1
- 2
- 3
- 4

### Select the item you want to move

Double click on the item you want to move.



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

#### 4. Open the stock tab

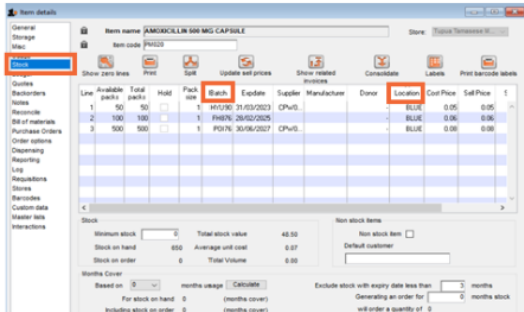
## Moving Stock

- 1
- 2
- 3
- 4

### Open the stock tab

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

In this example, there are 3 batches of amoxicillin all stored in the same location (Blue Shelf).



Line	Available	Total	Hold	Pack size	Batch	Expiry	Supplier	Manufacturer	Donor	Location	Cost Price	Sell Price
1	50	50		1	101/130	31/03/2013	CPHLL			BLUE	0.05	0.05
2	100	100		1	PM019	26/02/2009				BLUE	0.06	0.06
3	500	500		1	PM019	30/06/2007	CPHLL			BLUE	0.06	0.06

**Step 3:** Let's see how we can move all stock to a different location step by step.

#### 1. Open the stock line

### Moving Stock

- 1

#### Open the stock line

Double click the line to open a detailed window.

In this example, all our Amoxicillin stock is currently sitting on the Blue shelf.

## 2. Set the location

### Moving Stock

- 1
- 2

#### Set the location

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

In this example, we are moving all stock to the Red Shelf.

Click **OK**.

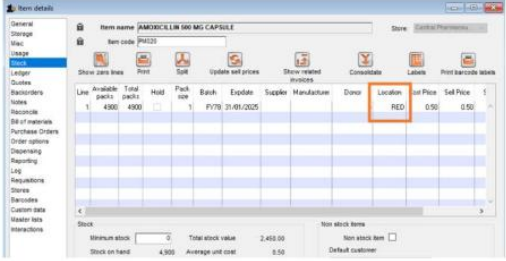
### 3. Summary page

**Moving Stock**

1 Set  
2 Enter  
3 In the  
4 Click

**Great work!**  
Now all your stock should be sitting in the Red Shelf.

Note: If you had multiple lines of stock to move, you would repeat this process for each line.



**Step 4:** We are going to look at Splitting Stock to Move Locations step by step.

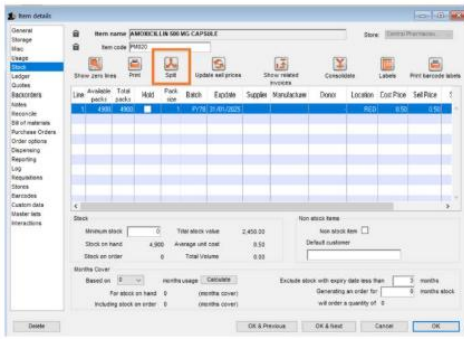
**Note:** Splitting stock to different locations means moving stock of the same batch to a different location; you need to split the stock.

### 1. Select the line to split

**Moving Stock**

1  
2  
3

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



## 2. Enter the quantity to split and the location

**Moving Stock**

1

2

3

### Enter the quantity to split and location

Enter the **Quantity to Split** (i.e. the quantity to move) and the **New Shelf Location** of the moved stock, then click **OK**.

In this example, 900 of 4900 packs are being moved to the Blue Shelf.

New repack

Quantity to split: 900 of 4900

New shelf location: BLUE

New pack size: 1

When you click OK a new repack transaction that reflects the change in stock will be created automatically.

☐ Print location movement report

Cancel OK

## 3. Review the locations

**Moving Stock**

1

2

3

### Review the locations

You can now see that 900 packs are stored on the Blue shelf and 4000 packs are stored on the Red Shelf.

New repack

Line	Product	Total	Unit	Batch	Supplier	Manufacturer	Store	Location	Cost Price	Sell Price
1	800	900		17176 30-06/2025				BLUE	0.50	0.50
2	4000	4000		17176 30-06/2025				RED	0.50	0.50

Stock

Stock on hand: 4,900

Stock on order: 0

Total volume: 0.00

Non stock items: ☐

Default customer:

Based on: 12 months usage (5000000)

Exclude stock with expiry date less than: 0 months

Expiry on order in: 0 months

Subtotal quantity of: 0

Details OK & Previous OK & Next Cancel Done

**Step 5:** Tell participants great work done so far. Now let move stock of the same batch to same location step by step. Consolidating stock is used when you have stock of the same batch stored in two or more locations.

**Step 6:** Conclude by informing them that the video slides are provided online under the **moving stock** session.

## Session 3.3: Repacking Stocks

### Objectives:

By the end of this session, the participants should be able to:

1. Explain the significance of repacking stocks
2. Demonstrate the process of repacking stocks

Total Time: 30 minutes

S/N	Activity	Learning Methods	Time Allocated
1.	Brief Introduction	Lecture	5 minutes
2.	Step-by-step Process of Repacking Stocks	Interactive lecturette	25 minutes

### 1. Activity 1: Brief Introduction – 5 minutes

**Step 1:** Repacking Stock is useful when you need to reduce the pack sizes of tablets into smaller packs for distribution or patient dispensing.

### 2. Activity 2: The Process of Repacking Stocks on mSupply

**Step 1:** Explain that there are 2 ways to repack items on mSupply.

- i. You can use the split function, which we discussed in moving the stock unit, or
- ii. Use the repack function under the item tab.

**Step 2:** Start by making reference to the Introduction above. Tell participants that we will look at the Split function and the repack function.

1. Split Function

## Split Function

The screenshot shows the 'Item details' window for 'Amoxicillin 500mg tabs'. The 'Split' icon in the top toolbar is highlighted with a red box. Below the toolbar is a table with columns: Line, Available packs, Total packs, Hold, Pack size, Batch, Expiry, Supplier, Manufacturer, Donor, Location, Cost Price, and Sell Price. The first row shows 1 available pack, 5 total packs, and a pack size of 1000. Below the table are fields for Stock (Minimum stock, Stock on hand, Stock on order), Total stock value, Average unit cost, Total Volume, and Months Cover. There are also checkboxes for 'Non stock item' and 'Default customer'.

## 2. Repacks Function

### Repacks Function

The screenshot shows the 'mSupply navigator' window. The 'Repacks' icon in the top toolbar is highlighted with a red box. Below the toolbar are several icons for different functions: Items, Repacks, Builds, Inventory adjustments, Ad Hoc Items, Stock, Locations, Replenishments, Departments, Item categories, and Master list. The 'mSupply' logo is at the bottom center, and 'DEMO LAND' is at the bottom right.

**Step 3:** Let's use the split function for Repacks. Please note that in moving the stock unit, we used the split function to move stock to a different location. We can also use the Split Function to repack stock by splitting the stock line into different pack sizes.

### Split Function

1. Select the line to Repack.

1

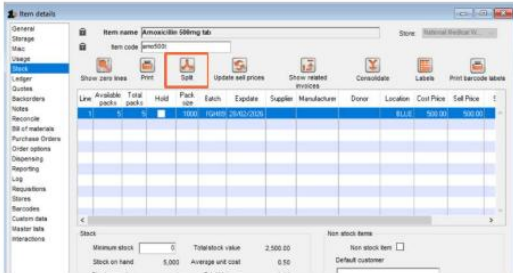
2

## Repacking stock

### Select the Line to Repack

In the item details window, under the stock tab, select the stock line you want to repack and then click **Split**.

In this example, we have 5 packs of amoxicillin, each containing 1000 tablets.



Line	Available	Total	Hold	Pack size	Each	Expiry	Supplier	Manufacturer	Donor	Location	Cost Price	Sell Price
1	5	5		1000	1000	26/03/2026				BLUE	100.00	100.00

## 2. Enter the Repack Details

1

2

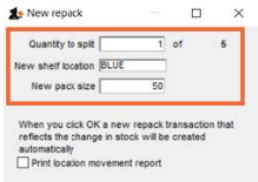
## Repacking stock

### Enter the Repack Details

Enter the **Quantity to Split** (i.e. the quantity to repack) and the **New Pack Size** of the repacked stock.

Click **OK**.

In this example, we are repacking 1 container (pack size 1000) into a new pack size of 50.



### 3. Summary page

**Great work!**

You can now see there is a new stock line containing packs of 50 tablets. mSupply automatically calculated that 1000 tablets split into a pack size of 50 = 20 packs.

The remaining 4 packs of 1000 remain unchanged.

The total quantity of tablets is also unchanged.

Line	Available	Total	Unit	Pack	Batch	Expiry	Supplier	Manufacturer	Order	Location	Cost Price	Sell Price
1	4	4		1000	FGH09 26/02/2026					BLUE	500.00	500.00
2	20	20		50	FGH09 26/02/2026					BLUE	25.00	25.00

**Step 4:** Let us use the Repack Function. Inform participants that this is a little more complex.

## Repack Function

### 1. Create a new Repack

**Create a New Repack**

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

The screenshot shows the mSupply navigator with the 'Items' tab selected. The 'New Repack' button is highlighted with an orange box. The 'Repacks' section is also highlighted with an orange box.



## 2. Enter the item Name

1

2

3

4

5

6

### Repacking stock

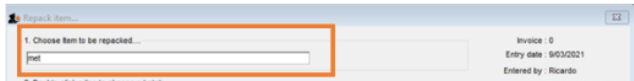
#### Enter the Item Name

Search for the item to be repacked.

You can:

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

In this example, we want to repack Metformin 500mg tablets so we will enter *met* and press tab, then select Metformin from the item list.



## 3. Choose a batch Line

1

2

3

4

5

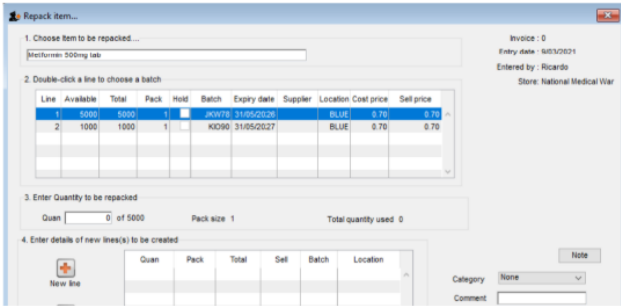
6

### Repacking stock

#### Choose a Batch Line

Double-click the batch that you want to repack.

In this example, we want to repack some of our stock from Line 1.



#### 4. Enter Repack Quantity

1

2

3

4

5

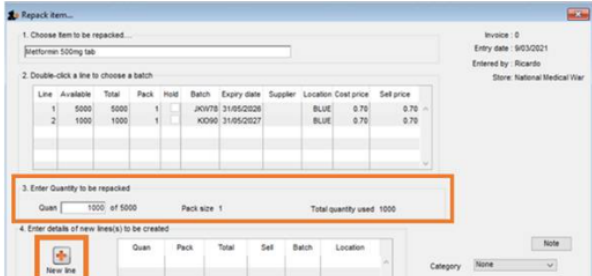
6

### Repacking stock

## Enter Repack Quantity

Enter the quantity of stock you want to repack. It can be the full quantity of the batch line, or just some of it. Then click **New Line**.

In this example, we are repacking 1000 tablets out of the 5000 available.



#### 5. Enter the New Repack Details

1

2

3

4

5

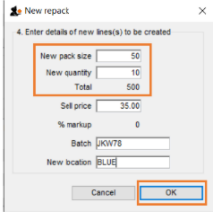
6

### Repacking stock

## Enter the New Repack Details

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

In this example, we want the pack size to be 50 tablets, and we want 10 packs.




#### 6. Enter Additional Repacks as needed

- 1
- 2
- 3
- 4
- 5
- 6

### Repacking stock

## Enter Additional Repacks as needed

Click the **New line** button to add another repack. 

Enter the details of the repack and click **OK**.

In this example, we want the pack size to be 20, and we want 25 packs.

**New repack** ×

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

New pack size

New quantity

Total 500

Sell price

% markup

Batch

New location

## 7. Review your Repacks

- 2
- 3
- 4
- 5
- 6
- 7

### Repacking stock

## Review your Repacks

In this example, we can see 2 repacks (10 x 50 tablets & 25 x 20 tablets) and the Total quantity used to create the repacks (1000 tablets).

If needed, double-click on a line to edit the repack details.

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

**Repack Item...** OK Cancel

1. Choose item to be repacked...

2. Double-click a line to choose a batch

Line	Available	Total	Pack	Unit	Batch	Expiry date	Supplier	Location	Cost price	Sell price
1	5000	5000	1		JKW78	31/05/2021		BLUE	0.79	0.79
2	1000	1000	1		X0999	31/05/2021		BLUE	0.79	0.79

3. Enter Quantity to be repacked

Quan  of 5000 Pack size 1 Total quantity used 1000

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

☐ Print

Quan  Pack

Total

**Step 5:** Trainers should clap for the participants for creating multiple repacks from a single batch line. Now, let's learn how to print labels for our repack bottles step by step.


## 1. Open Misc Labels

**Repacking stock**

**1**

### Open Misc labels

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



## 2. Select Label

**Repacking stock**

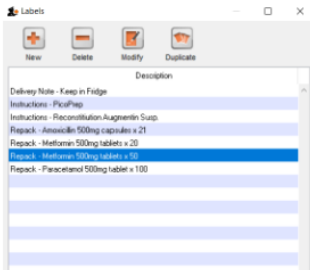
**1**

### Select Label

Double click the label you want to use.

*Note: If the label you need isn't there, you can create one! You will learn how to add Misc labels in the next unit.*

**2**



## 3. Enter Label Details

**Repacking stock**

**1**

### Enter Label Details

Enter the Batch and Expiry details of the repack, and any other details your store requires, into the Label details **Body** text.

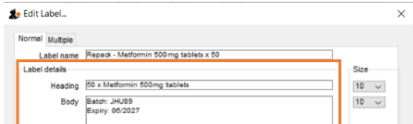
Enter the **Quantity** of labels you want to print.

Click **Print**.

*Note: Clicking OK will save the details you input on the label. If you don't want to save the details, click **Cancel** to exit the window without saving.*

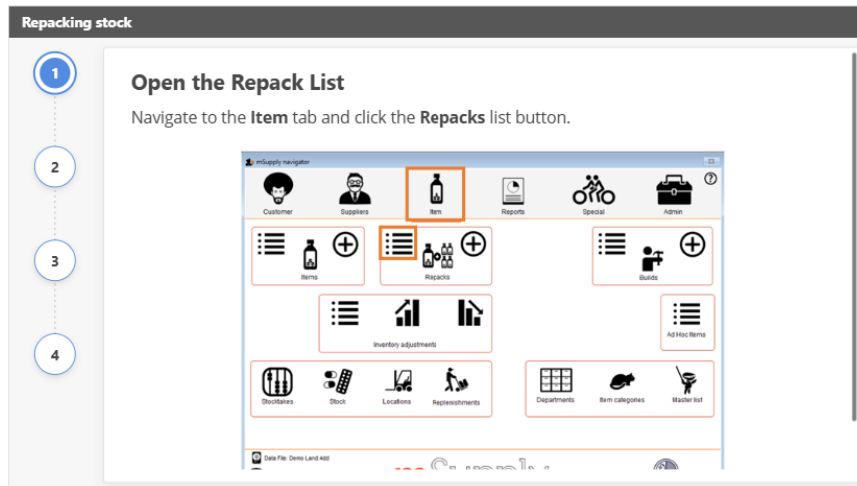
**2**

**3**

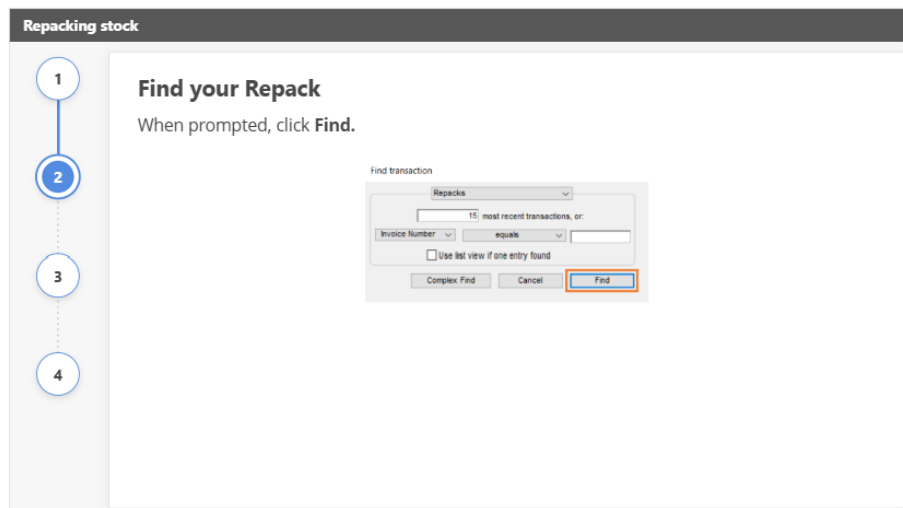


**Step 6:** Tell participants that we have printed our labels and can dispense your repacks. Let's finalize them in mSupply step by step.

## 1. Open the Repack List



## 2. Find your Repack



### 3. Select the Repack

Repacking stock

1

2

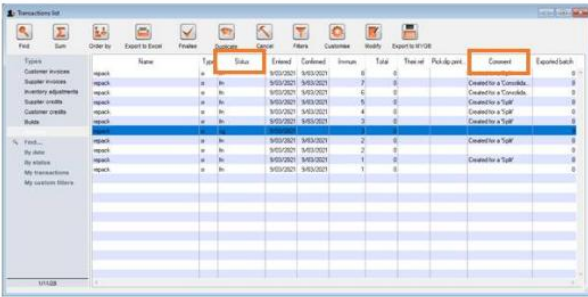
3

4

### Select the Repack

Double click the Repack you want to finalise.

*Hint: the status will be 'sg' and the comment column should be blank.*



### 4. Change the Status to Finalised

Repacking stock

1

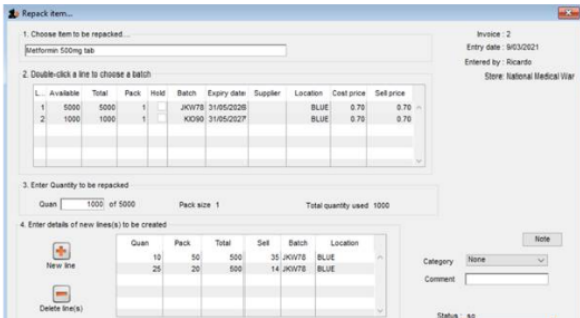
2

3

4

### Change the Status to Finalised

From the drop down menu, change the status of the repack from Suggested (sg) to **Finalised (fn)**, then click **OK**.



**Step 7:** Conclude by asking participants if they have questions.

## Session 3.4: Stocktakes (General)

### Objectives:

By the end of this session, the participants should be able to:

1. Explain the importance of stocktakes (general)
2. Perform general stocktakes using the mSupply

Total Time: 30 minutes

S/N	Activity	Learning Methods	Time Allocated
1.	Brief Introduction	Lecture	5 minutes
2.	The Process of Stocktakes	Interactive lecturette	25 minutes

### 1. Activity 1: Brief Introduction – 5 minutes

**Step 1:** Explain that, when you first open mSupply, your stock will be empty. You will need to perform a stocktake, a physical count of all stock in your store. Noting the item name, batch and expiry date, and enter these details in mSupply.

**Step 2:** Explain further that full stocktakes are performed regularly according to local policy. You might also need to perform ad hoc stocktakes for a single or few items if you need to adjust stock levels for any reason (e.g., damaged or expired medicines).

### 2. Activity 2: Brief Introduction – 25 minutes

**Step 1:** Tell participants that we will do a full stocktake for our store. Participants should be directed to the online slide-video for visual learning. Tell them to pay serious attention.

**Step 2:** Inform participants that you will manually add items like that once, when you first set up mSupply. Let's take a look at how to perform a regular stocktake step by step.


## 1. Open Stocktakes

**Stocktakes (general)**

**1**

### Open Stocktakes

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



The screenshot shows the mSupply navigator interface. The 'Item' tab is selected in the top navigation bar. In the main content area, the 'Stocktakes' icon is highlighted with a red box. Other icons visible include Customer, Suppliers, Reports, Special, Admin, Items, Repacks, Buys, Inventory adjustments, Ad Hoc Items, Stock, Locations, Replenishments, Departments, Item categories, and Master list.

## 2. New Stocktake

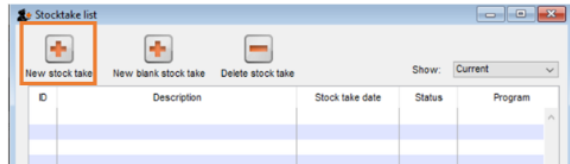
**Stocktakes (general)**

**1**

### New Stocktake

Click **New stock take**.

**2**



The screenshot shows the 'New Stocktake' dialog box. The 'New stock take' button is highlighted with a red box. Other buttons visible are 'New blank stock take' and 'Delete stock take'. The dialog also includes a 'Show:' dropdown menu set to 'Current' and a table with columns: ID, Description, Stock take date, Status, and Program.

ID	Description	Stock take date	Status	Program



### 3. Select Items to stock take.

1  
2  
**3**  
4  
5  
6

#### Stocktakes (general)

### Select items to stock take

An Item filter window appears if you want to select certain items to stock take (this will be discussed later). If you leave it blank, you will be conducting a stocktake of every item in your store.

Click **OK**.

Select items to stock take.

Item filter:

Search for items whose:

Item code starts with

and Category 1 is

and VEN category is Dent Care

and Department is Dent Care

And Program is Dent Care

And Stock location equals

And Expiry date is on or before 09/05/00

And Donor equals

Randomly select 0 items from returned list.

>>

### 4. Enter the Stocktake Description

1  
2  
3  
**4**  
5  
6

#### Stocktakes (general)

### Enter the Stocktake Description

Add a **description** for your stocktake so it can be easily recognised by other users.

Stock take sheet.

Description Annual stocktake

Comment

Stock take date 10/03/2021

Stock take number 5

Stock take entered date 10/03/2021

Stock take status ng

New line Delete lines Print Create inventory requirements Order by

Ln	Location	Item code	Item name	Batch	Expiry	Shapex	Pack Size	Enter Quantity	Comment
1	BLUE	amc500	Amoxicillin 500mg tab	PSH89	28/02/2026	4	1000	4	
2	BLUE	amc500	Amoxicillin 500mg tab	PSH89	28/02/2026	20	50	20	
3	BLUE	carh250	Carbamazepine 250mg sy	VTU23	31/05/2024	4000	1	4000	
4	BLUE	chp100	Chloroquine phosphate 100mg (tablets) tab	PSH87	31/07/2025	7000	1	7000	
5	BLUE	chp500	Chloroquine phosphate 500mg (tablets) sy	TVK55	31/05/2022	2000	1	2000	
6	BLUE	clm5	Clonidine 5mg tab	CS598	31/05/2026	7000	1	7000	
7	BLUE	clm5	Clonidine 5mg tab	CS598	31/05/2026	10	100	10	
8	BLUE	clm200	Clonidine 200mg tab	KU446	28/02/2026	8000	1	8000	
9	BLUE	clm300	Clonidine 300mg tab	QNU24	28/02/2023	8000	1	8000	
10	BLUE	clm500	Clonidine 500mg tab	KU476	31/05/2027	4000	1	4000	
11	BLUE	clm500	Clonidine 500mg tab	JWV79	31/05/2026	4000	1	4000	
12	BLUE	clm500	Clonidine 500mg tab	KU480	31/05/2027	1000	1	1000	
13	BLUE	clm500	Clonidine 500mg tab	JWV79	31/05/2026	10	80	10	
14	BLUE	clm500	Clonidine 500mg tab	JWV79	31/05/2026	25	20	25	
15	BLUE	clm500	Clonidine 500mg (tablets) sy	NH87	31/05/2026	4000	1	4000	
16	BLUE	clm500	Clonidine 500mg tab	POL32	31/05/2022	10000	1	10000	
17	BLUE	clm750	Clonidine 750mg 7 mg tab	KU482	31/05/2023	6000	1	6000	
18	BLUE	clm750	Clonidine 750mg 7 mg tab	GGF78	31/05/2026	5000	1	5000	
19	BLUE	clm750	Clonidine 750mg 7 mg tab	DN79	28/02/2023	5000	1	5000	

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## 5. Edit Stock Line Details

Stocktakes (general)

1

2

3

4

5

6

### Edit Stock Line Details

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

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

>>

## 6. Adding items from your Physical Stocktake

Stocktakes (general)

1

2

3

4

5

6

### Adding items from your Physical Stocktake

If you need to add an item that isn't on your stocktake list, click **New line** and search for the item, and add the relevant details as shown in the earlier video.

Click **Add New**.

>>

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## 7. Create Inventory Adjustments

3  
4  
5  
6  
7  
8

### Stocktakes (general)

## Create Inventory Adjustments

Review your stocktake carefully.

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

>>

## 8. Review your stock

3  
4  
5  
6  
7  
8

### Stocktakes (general)

## Review your stock

You can check your stock by going to the **Item** tab and clicking **Stock**.

>>

**Step 3:** Congratulate the participants for completing a full stocktake of store inventory.

**Step 4:** We are looking at how to do the Partial Stocktake step by step.

**Note**, there are 2 ways to add a Partial Stocktake.

- Add a New Stocktake and add filters to limit the items added OR
- Add a black stocktake and manually add items you need.

**Step 5:** Let's start with Add Filter to a New Stocktake. Now we see the step-by-step process to achieve this.

## 1. Item Filter

### Stocktake (general)

#### Item Filter

You can select from the dropdown menu which items you want to add.

For example:

- You might want to add all items that name start with amox, to capture all amoxicillin items you have in stock.
- You might want to complete a physical stocktake of only items that appear on your Essential Drugs List.
- You might filter the item by code if you only want to stocktake 1 specific item in your store.

### Select items to stock take...

Item filter...

Search for items whose...

★ Item name starts with

★ and Category 1 is

and VEN category is Don't Care

and Department is Don't Care

And Program is Don't Care

And ★ Stock location equals

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

And Donor equals

★ Randomly select 0 items from returned list.

Cancel OK

## 2. Additional filter or categories

### Stocktake (general)

#### Additional filters or categories

You can add additional or alternative requirements to your search by selecting **AND** or **OR** in the drop down.

If you have categories set up in your store (eg Anaesthetics, Antibiotics), you can filter by drug category too.

### Select items to stock take...

Item filter...

Search for items whose...

★ Item name starts with

★ and Category 1 is

and VEN category is Don't Care

and Department is Don't Care

And Program is Don't Care

And ★ Stock location equals

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

And Donor equals

★ Randomly select 0 items from returned list.

Cancel OK

### 3. Stock Location

**Stocktake (general)**

#### Stock location

If you only want to stocktake a particular location in your store, you can filter by location here.

Select items to stock take...

Item filter...

Search for items whose...

Item name starts with

and Category 1 is

and VEN category is Don't Care

and Department is Don't Care

And Program is Don't Care

And Stock location equals

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

And Donor equals

Randomly select 0 items from returned list.

Cancel OK

### 4. Expiry date

**Stocktake (general)**

#### Expiry date

If you want to complete a stocktake for items expiring by a particular date, you can enter an expiry filter here.

This can also be useful to check which items are expiring soon.

Select items to stock take...

Item filter...

Search for items whose...

Item name starts with

and Category 1 is

and VEN category is Don't Care

and Department is Don't Care

And Program is Don't Care

And Stock location equals

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

And Donor equals

Randomly select 0 items from returned list.

Cancel OK

## 5. Randomly Select

**Stocktake (general)**

### Randomly select

Here you can enter a number of items you want to randomly stocktake. This can be useful for auditing the accuracy of your stock levels in your store.

Select items to stock take...

Item filter...

Search for items whose...

★ Item name starts with

★ and Category 1 is

and VEN category is

and Department is

And Program is

And ★ Stock location equals

And ★ Expiry date is on or before

And Donor equals

★ Randomly select 0 items from returned list.

Cancel OK

**Step 6:** We will be looking at **Add a Blank Stocktake** step by step.

### 1. Click on Stocktakes

**Stocktakes (general)**

### Click on Stocktakes

Navigate to the **Items** tab and click **Stocktakes**.

The screenshot shows the mSupply Navigator application interface. At the top, there is a navigation bar with icons for Customer, Suppliers, Items, Reports, Special, and Admin. The 'Items' icon is highlighted with a red box. Below the navigation bar, there is a grid of icons representing different functions: Items, Repacks, Builds, Inventory adjustments, Stocktakes, Stock, Locations, Replenishments, Departments, Item categories, and Master lists. The 'Stocktakes' icon is highlighted with a red box. On the left side of the screen, there is a vertical list of numbered circles from 1 to 5, with the number 1 circled in blue.

## 2. Create a New Blank Stocktake

1

2

3

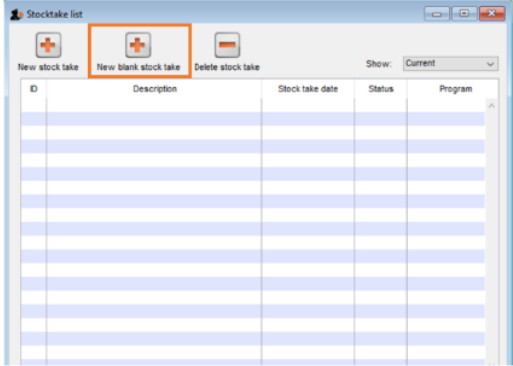
4

5

### Stocktakes (general)

## Create a New Blank Stocktake

Click **New blank stock take**



The screenshot shows a window titled 'Stocktake list'. At the top, there are three buttons: 'New stock take', 'New blank stock take' (highlighted with a red box), and 'Delete stock take'. Below the buttons is a table with columns: ID, Description, Stock take date, Status, and Program. The table has several empty rows.

## 3. Add a new Line

1

2

3

4

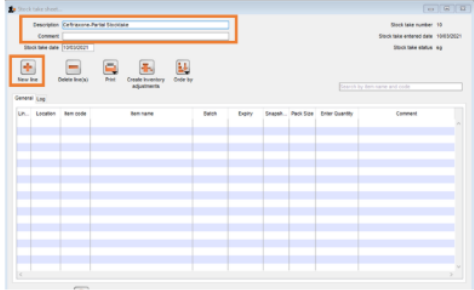
5

### Stocktakes (general)

## Add a New Line

Enter a **Description** for your Stocktake. You can also enter a reason for your Stocktake in the comment box.

Click **New Line**.



The screenshot shows a window titled 'Stocktake list'. At the top, there are five buttons: 'New Line' (highlighted with a red box), 'Delete stock take', 'Print', 'Create inventory adjustments', and 'Order by'. Below the buttons is a table with columns: Location, Item code, Item name, Batch, Expiry, Stock, Pack Size, Order Quantity, and Comment. The table has several empty rows.

#### 4. Add Stockline Details

1

2

3

4

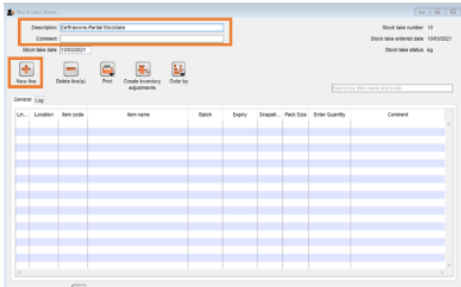
5

### Stocktakes (general)

## Add a New Line

Enter a **Description** for your Stocktake. You can also enter a reason for your Stocktake in the comment box.

Click **New Line**.



The screenshot shows the 'Stocktake sheet' window. The 'Description' field is highlighted with an orange box. Below it, the 'Stock take date' is set to 1/10/2021. The 'New Line' button is highlighted with an orange box. The table below has columns: Lk., Location, Item code, Item name, Batch, Expiry, Snapshot, Pack Size, Enter Quantity, and Comment. The first row contains data: 1, BLUT, carbz200, Carbazone 200mg (g), M0089, 31/08/2027, 0, 1, 1000.

#### 5. Create Inventory Adjustment

1

2

3

4

5

### Stocktakes (general)

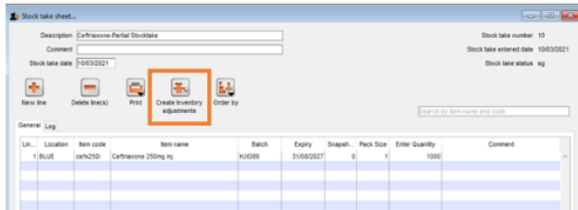
## Create Inventory Adjustments

Review your stocktake carefully.

To finish the stocktake, click **Create Inventory Adjustments** to update your stock levels.

Click **Yes** when prompted.

Click **OK** to close the Stocktake window.



The screenshot shows the 'Stock take sheet' window. The 'Create Inventory Adjustments' button is highlighted with an orange box. The table below has columns: Lk., Location, Item code, Item name, Batch, Expiry, Snapshot, Pack Size, Enter Quantity, and Comment. The first row contains data: 1, BLUT, carbz200, Carbazone 200mg (g), M0089, 31/08/2027, 0, 1, 1000.

**Step 7: At this point, we have successfully learnt Full Stocktake and Partial Stocktake. Now let's look at Reviewing and Deleting Stocktake step by step.**



## 1. Reviewing All Stocktakes

1

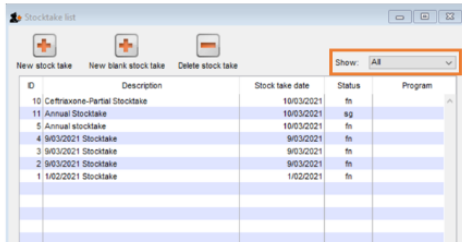
2

### Reviewing All Stocktakes

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

Current stocktakes will be automatically shown. In the **Show** dropdown list, select **All**.

Double click on the stocktake to open it.



ID	Description	Stock take date	Status	Program
10	Ceftriaxone-Partial Stocktake	10/03/2021	fn	
11	Annual Stocktake	10/03/2021	sg	
5	Annual stocktake	10/03/2021	fn	
4	9/03/2021 Stocktake	9/03/2021	fn	
3	9/03/2021 Stocktake	9/03/2021	fn	
2	9/03/2021 Stocktake	9/03/2021	fn	
1	10/2/2021 Stocktake	10/2/2021	fn	

## 2. Deleting Unfinished Stocktakes

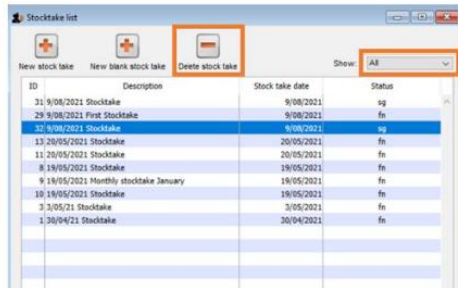
1

2

### Deleting Unfinished Stocktakes

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

Select the Stocktake you wish to delete, then click **Delete stock take**.



ID	Description	Stock take date	Status
31	9/08/2021 Stocktake	9/08/2021	sg
29	9/08/2021 First Stocktake	9/08/2021	fn
27	9/08/2021 Stocktake	9/08/2021	fn
13	20/05/2021 Stocktake	20/05/2021	fn
11	20/05/2021 Stocktake	20/05/2021	fn
8	19/05/2021 Stocktake	19/05/2021	fn
9	19/05/2021 Monthly stocktake January	19/05/2021	fn
10	19/05/2021 Stocktake	19/05/2021	fn
3	3/05/21 Stocktake	3/05/2021	fn
1	30/04/21 Stocktake	30/04/2021	fn

**Step 8:** Congratulations to all our participants, you have completed a Full stocktake, a Partial stocktake, reviewed your stocktake and deleted incomplete stocktakes.

## Session 3.5: Stocktakes (Program)

### Objectives:

By the end of this session, the participants should be able to:

1. Explain the importance of program stocktakes
2. Perform program stocktakes using the mSupply

Total Time: 30 minutes

S/N	Activity	Learning Methods	Time Allocated
1.	Brief Introduction	Lecture	3 minutes
2.	The Process of Program Stocktakes	Interactive lecturette	12 minutes

### 1. Activity 1: Brief Introduction – 5 minutes

**Step 1:** Once programs are set up in mSupply, creating a Program Stocktake is easy. It's just like a normal stocktake with one filter applied.

### 2. Activity 2: The Process of Program Stocktake – 12 minutes

**Step 1:** In this session, we will be looking at Programs Stocktake. Let's begin step by step.


1. Open Stocktake

**Stocktakes (Programs)**

**1**

## Open Stocktakes

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



The screenshot shows the mSupply navigator application. The top navigation bar includes icons for Customer, Suppliers, Item (highlighted with an orange box), Reports, Special, and Admin. Below this, there are several functional area icons: Items, Repacks, Builds, Inventory adjustments, Stocktakes (highlighted with an orange box), Stock, Locations, Replenishments, Departments, Item categories, and Master lists.

## 2. New Stock take

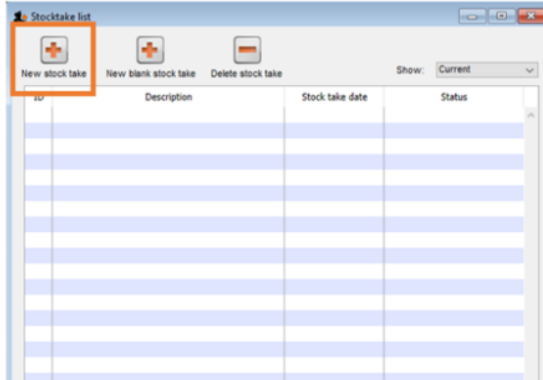
**Stocktakes (Programs)**

**1**

## New stock take

The Stocktake list window appears. Click **New Stocktake**.

**2**



The screenshot shows the 'Stocktake list' window. At the top, there are three buttons: 'New stock take' (highlighted with an orange box), 'New blank stock take', and 'Delete stock take'. Below these buttons is a table with the following columns: ID, Description, Stock take date, and Status. The table has several empty rows for data entry. A 'Show: Current' dropdown menu is located in the top right corner of the window.

## 3. Select Program

## Stocktakes (Programs)

1

### Select Program

From the **Master List** drop-down box, select the Program you wish to perform a stocktake on, and then press **OK**. (Note: How to set up programs will be covered in a later level)

In this example, we want to perform a stocktake on the Tuberculosis program.

2

3

4

Select items to stock take...

Item filter...

Search for items whose...

Item code starts with

and Category 1 is

and VEN category is Don't Care

and Department is Don't Care

And is on Master List Tuberculosis progr...

And Stock location equals

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

## 4. Stocktake Items appear

### Stocktakes (Programs)

1

### Stocktake items appear

All the items listed under that program which mSupply thinks you have will appear in your stocktake!

Now you can complete the process as you would any other stocktake.

2

3

4

Stock take sheet...

Description: 22/07/2021 Stocktake

Comment:

Stock take date: 22/07/2021

Stock take number: 22

Stock take entered date: 22/07/2021

Stock take status: kg

New line, Delete line(s), Print, Create inventory adjustments, Order by

Scanning for locations: No location

Line	Location	Item code	Item name	Batch	Expiry	Shopped	Pack Size	Enter Quantity	Comment
1	ETH420	ETH420	ETH420 100mg tab	60115	29/02/2024	20	50	0	
2	ETH420	ETH420	ETH420 400mg tab	60145	31/03/2023	10	50	0	
3	ETH420	ETH420	ETH420 100mg tab	60145	29/02/2024	30	100	0	
4	ETH420	ETH420	ETH420 100mg tab	601113	22/07/2023	300	1	0	
5	ETH420	ETH420	ETH420 100mg tab/cap	601433	31/03/2023	10000	1	0	

**Step 2:** With the steps above, you have successfully completed Program Stocktake.

## Session 3.6: Inventory Adjustment

### Objectives:

By the end of this session, the participants should be able to:

1. Describe the process of inventory adjustment
2. Conduct an inventory adjustment, both add or reduce stock

Total Time: 30 minutes

S/N	Activity	Learning Methods	Time Allocated
1.	Brief Introduction	Lecture	5 minutes
2.	How to Conduct an Inventory Adjustment	Interactive lecturette	25 minutes

### 1. Activity 1: Brief Introduction – 5 minutes

**Step 1:** Explain that the inventory adjustment allows you to increase or decrease the quantity of stock that is recorded in mSupply.

**Step 2:** You will need to adjust the inventory if:

- i. Stock needs to be destroyed (Due to damage or expiry)
- ii. Stock has been stolen
- iii. You find some stock on the shelf that is not in mSupply, and you don't know where it came from.

**Step 3:** Emphasize that they do not use Inventory adjustments for distributing stock to customers or patients or receiving stock from suppliers. Inventory adjustments are used to deal with a problem or fix a mistake, not in the general process of entering transactions into mSupply.

**Step 4:** Ideally, you should always complete a physical count of stock when adjusting the stock level.

### 2. Activity 2: How to Conduct an Inventory Adjustment – 25 minutes

**Step 1:** Welcome participants to this activity and inform them that we will look at the step-by-step process of how to make an inventory adjustment.

## 1. Navigate to the Item tab.

**Inventory adjustments**

### Navigate to the Items tab

Navigate to the Items tab.

The screenshot shows the mSupply navigator interface. At the top, there is a navigation bar with icons for Customer, Suppliers, Item (selected), Reports, Special, and Admin. Below this, there are several functional areas with icons: Items, Repacks, Builds, Ad Hoc Items, Inventory adjustments, Stocktakes, Stock, Locations, Replenishments, Departments, Item categories, and Master list. The 'Item' tab is highlighted with an orange star icon. The bottom of the screen displays the mSupply logo and the DEMO LAND logo.

## 2. Inventory adjustment list

**Inventory adjustments**

### Inventory adjustment list

This button allows you to view all previous inventory adjustments.

The comment section will provide a reason for the inventory adjustment.

The screenshot shows the mSupply navigator interface. At the top, there is a navigation bar with icons for Customer, Suppliers, Item (selected), Reports, Special, and Admin. Below this, there are several functional areas with icons: Items, Repacks, Builds, Ad Hoc Items, Inventory adjustments, Stocktakes, Stock, Locations, Replenishments, Departments, Item categories, and Master list. The 'Inventory adjustments' button is highlighted with an orange star icon. The bottom of the screen displays the mSupply logo and the DEMO LAND logo.

### 3. Inventory adjustment – Add stock

**Inventory adjustments**

**Inventory adjustment - add stock**  
This button allows you to create an inventory adjustment to add some stock into mSupply.

### 4. Inventory adjustment- reduce stock

**Inventory adjustments**

**Inventory adjustment - reduce stock**  
This button allows you to create an inventory adjustment to reduce some stock in mSupply.

**Step 2:** Now, let's look at how to create inventory Adjustments – Add Stock





### 3. Enter the stock Details

#### Enter the Stock Details

Search for the item you want to adjust stock for.

Enter the quantity you want to increase stock levels by.

Enter the batch and expiry, and any additional details (as necessary).

Click **OK** to return to the Inventory adjustment window, or **OK & Next** if you want to add another item.

Add/edit inventory adjustment line

Item: Ceftriaxone 250mg inj

Received quantity: 3

Pack size: 10

Total quantity: 30.00

Batch: KO089

Expiry: 28/02/2023

Invoice quantity: 3

Invoice pack size: 10

Invoice total quantity: 30.00

Location: BLUE

Volume per pack: 0 m3

### 4. Finalise the Inventory Adjustment

#### Finalise the Inventory Adjustment

Review your Inventory Adjustment.

If you don't need to make any more edits, check the **Finalise** box and click **OK**.

Inventory adjust - add stock

Name: Inventory adjust - add stock

Their ref: [blank]

Comment: Discovered stock

Confirm date: 11/03/2021

Category: None

Donor: [blank]

Colour: Black

Invoice number: 8

Entry date: 11/03/2021

Status: on

Goods received ID: 0

Purchase Order ID: 0

Request ID: 0

Entered by: Ricardo

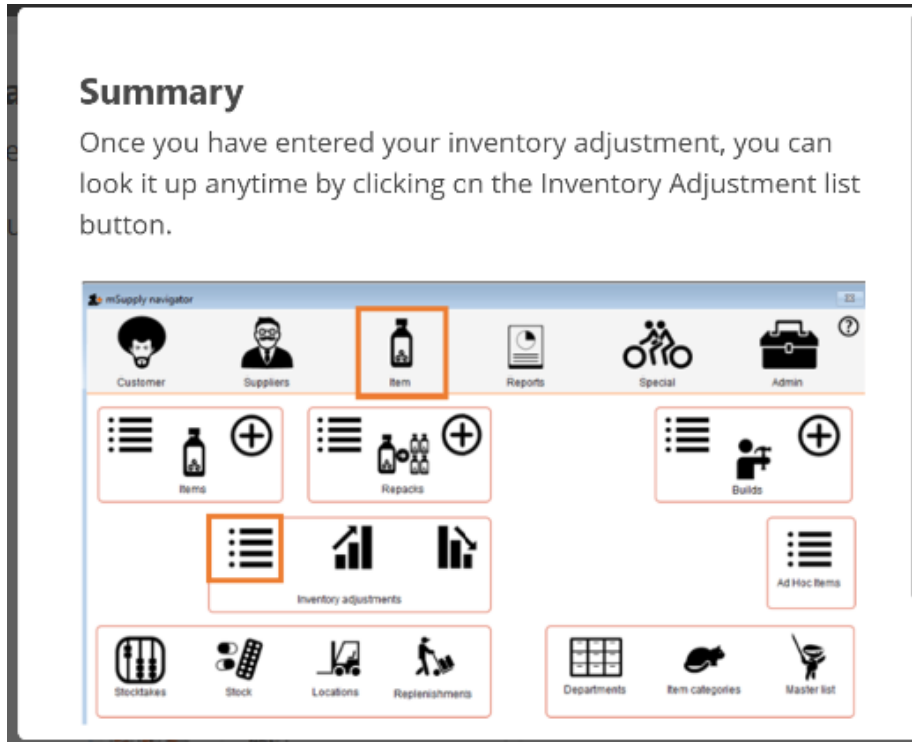
Store: National Medical Warehouse

Line	Location	Item code	Item Name	Donor	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension	Adjustment
1	BLUE	cef250i	Ceftriaxone 250mg inj		3	10	KO089	28/02/2023	0.00	0.00	0.00	

Other charges: [blank]

Subtotal: 0.00

## 5. Summary



**Step 3:** Next, us to look at the step-by-step of Inventory Adjustment – Reduce Stock

1. Create a New Inventory Adjustment to Reduce Stock,

### Create a New Inventory Adjustment to Reduce Stock

Navigate to the **Item** tab and click the **Inventory adjustment-reduce stock** button.



## 2. Add a New Line

### Add a New Line

Enter a reason for the Inventory adjustment in the **Comment** textbox, or select a reason from the **Category** dropdown list if available (you'll learn how to set this up in a later level).

Click **New Line**.

## 3. Enter the Item Details

### Enter the Item Details

Enter the **item name**.

Click on the **batch line** that you want to reduce stock for.

Enter the **quantity** that you want to reduce the stock level by.

In this example we have typed 500, so we will reduce this batch line by 500 packs.

Click **OK** to return to the Inventory adjustment window, or **OK & Next** if you want to add another item.

#### 4. Finalize the Inventory Adjustment

##### Finalise the Inventory Adjustment

Review your Inventory Adjustment.

Check the **Print** box if you want to print the Inventory Adjustment.

If you do not want to make any further changes to the Inventory Adjustment, check the **Finalise** box.

Click **OK**.

L. In.	Item code	Item Name	Qty	Pack	Batch	Entry	Cost Price	Sell Price	Price extension	Adjustment reason
1	18L_1000200	Cellucare 250mg eq	500	1	Y70225	31/05/2024	1.00	1.00	500.00	

**Step 4:** Ask participants if they have any questions. Ensure all questions are answered as clearly as possible.

## Session 3.7: Builds

### Objective:

By the end of this session, the participants should be able to demonstrate the ability to build new items

Total Time: 35 minutes

S/ N	Activity	Learning Methods	Time Allocated
1.	Brief Introduction	Lecture	5 minutes
2.	How to Build Items in mSupply	Interactive lecturette	30 minutes

### 1. Activity 1: Brief Introduction – 5 minutes

**Step 1:** Explain that the mSupply allows you to manufacture (build) a new item from two or more existing items. A build is a way of recording items you have manufactured. That is, raw materials that are in your stock are used to create.

**Step 2:** Before we can build an item, we need to ensure that the bill of materials (the ingredients and method) have been added to the item's details. If this is the first time you are making this item, you need to add it as a new item in mSupply.

### 2. Activity 2: How to Build Items in mSupply – 30 minutes

**Step 1:** Inform participants that we will be learning step by step how to create a Bill of Materials for the item we want to build.

1. Search for the item to build

Navigate to the **Item** tab and click on the **Item list** button.



## 2. Search for the item

### Search for the Item

Search for the item and click **Find**.

Find items

Item name starts with enalapril

and Category I is

and VEN category is Don't Care

and Department is Don't Care

and is on Master List Don't Care

Randomly select 0 items from returned list.

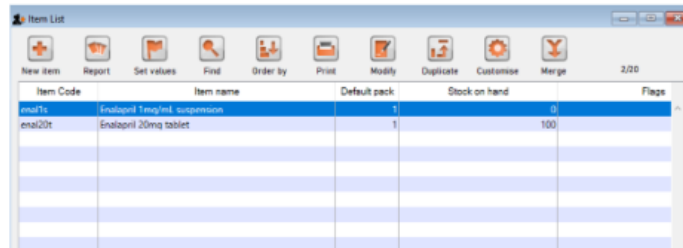
☒ Exclude hidden items

Complex Find Cancel Find

### 3. Select the item

#### Select the item

Double click on the item to open the Item details window.



Item Code	Item name	Default pack	Stock on hand	Flags
enal20t	Enalapril 20mg/ml suspension	1	0	
enal20t	Enalapril 20mg tablet	1	100	

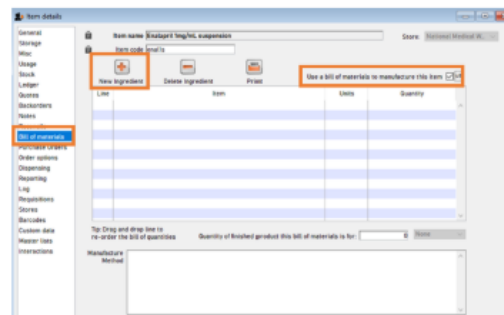
### 4. Open the Bill of Materials

#### Open the Bill of Materials

Click on the **Bill of Materials** tab.

Check the **Use a bill of materials to manufacture this item** box.

Click **New Ingredient**.



Item details

Item name: Enalapril 20mg/ml suspension

Item code: enal20t

Buttons: New Ingredient, Delete Ingredient, Print

Checkbox: Use a bill of materials to manufacture this item ☒

Line	Item	Units	Quantity

Tip: Drag and drop line to re-order the bill of quantities. Quantity of finished product this bill of materials is for: 1000

Manufacture Method

## 5. Add ingredient to the Bill of Materials

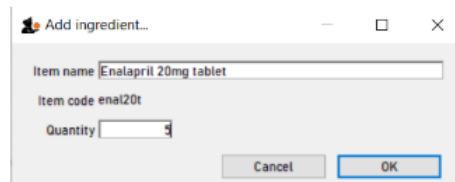
### Add ingredients to the Bill of Materials

Enter the raw ingredient **name** and **quantity** that will be used to build the new item, then click **OK**.

Click **New Ingredient** to add another ingredient, as required.

*In this example we want to make 100mL of Enalapril 1mg/mL suspension.*

Note that this will be used as your master formula for the final product - mSupply will calculate how much you need of each ingredient each time you make this item, even if you require different quantities of final product.



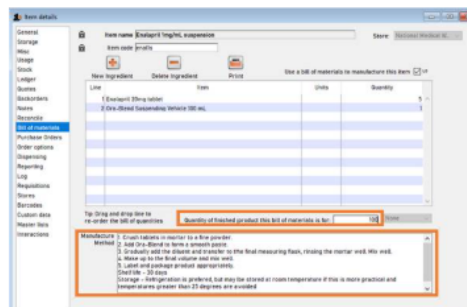
## 6. Enter the Manufacture Method

### Enter the Manufacture Method

Enter the **Quantity of finished product**.

Enter the **Manufacture Method**. It's useful to add expiry and storage details here also.

Review the Bill of Materials, then click **OK**.





## 7. Summary

### Summary

Success! You have just entered the Bill of materials for a new item to build. You only need to enter the Bill of Materials once for each build item.

The quantity of ingredients will be automatically calculated for the quantity of product you wish to build each time.

Now it's set up you can move on to building the item, let's learn how.



**Step 2:** Inform the participants that to build functions in mSupply is where you add the Bill of Materials to the new item you want to build. It takes the raw ingredients out of stock and adds stock to the item you are building. Let's see the step-by-step process of how to build.

### 1. Add a New Build

#### Add a New Build

Navigate to the **Item** tab and click the **New Builds** button.



## 2. Add the Item to Build

### Add the Item to Build

Enter a **Reference** for your build and a **Comment**, if required.

Click the **Item to build or to edit** button.

New build

Reference: 22042021 Comment: For Dispensary Stock

Category: None

Colour: Black

Invoice: 0

Date: 22/04/2021

Store: National Medical Wa

Item to build or to edit

Print labels

Item name	Quan	Item	Units	Batch	Expiry	Price	Price Exten
	0	0				0	0

## 3. Add the Build details

### Add the Build details

Enter the **item** you want to build.

Enter the **quantity** to build, **batch** and **expiry**, then click **OK**.

You can edit the cost and sell price once you have added the Bill of Materials.

Click **OK**.

Add/edit supplier invoice line

Item: Enalapril 1mg/ml, suspension

Received quantity: 100

Pack size: 1

Total quantity: 100.00

Batch: SLD0121

Expiry: 22/05/2021

Invoice quantity: 100

Invoice pack size: 1

Invoice total quantity: 100.00

Location: None

Volume per pack: 0 m3

Invoice line unit cost (USD): 0.00

Adjusted local cost: 0.00

% Margin: 0.00

Sell price: 0.00

Price extension: 0.00

Donor:

New item

#### 4. Add the Bill of Materials

##### Add the Bill of Materials

Click on the **Bill of materials** tab.

Click **Add Bill of Materials**, and click **OK** when prompted. This will automatically calculate how much stock is required for the amount you are making.

*Note: If you adjust the build quantity after this step, you will need to delete the individual ingredients under the ingredients tab first before clicking **Add Bill of Materials** again for revised quantities.*

The screenshot shows the 'New build' window. At the top, there's a 'Reference' field with '22042021' and a 'Comment For Dispensary Stock' field. Below this is a 'Category' dropdown set to 'None'. To the right, there's a 'Colour' dropdown set to 'Black', an 'Invoice' field with '3', a 'Date' field with '22/04/2021', and a 'Store' field with 'National Medical W'. In the center, there's a table with columns: 'Item name', 'Quan', 'Item', 'Units', 'Batch', 'Expiry', 'Price', and 'Price Exten'. The first row shows 'Enalapril 1mg/ml, suspension' with a quantity of '100', '1' unit, and a batch of 'BL02/21'. Below the table, there are three tabs: 'Ingredients', 'Add Bill of Materials', and 'Manufacturing Method'. The 'Add Bill of Materials' tab is selected and highlighted with a red box. At the bottom, there's a table with columns: 'Line', 'Item name', 'Units', 'Target Quan', 'Total used', and 'Yield'. The first row shows 'Enalapril 1mg/ml, suspension' with '1' unit, a target quantity of '9', and a yield of '9'.

#### 5. Review Manufacturing Method

##### Review Manufacturing Method

You can review the method by clicking on the **Manufacturing Method** tab.

The screenshot shows the 'New build' window with the 'Manufacturing Method' tab selected and highlighted with a red box. The tab contains a list of instructions: '1. Crush tablets in mortar to a fine powder.', '2. Add Ora-Blend to form a smooth paste.', '3. Gradually add the diluent and transfer to the final measuring flask, rinsing the mortar well. Mix well.', '4. Make up to the final volume and mix well.', '5. Label and package product appropriately.', '6. Shelf life - 30 days.', and 'Storage - Refrigeration is preferred, but may be stored at room temperature if this is more practical and temperatures greater than 25 degrees are avoided.' Below the instructions, there's a large empty text area.

## 6. Allocate Batch Lines to Ingredients

### Allocate Batch Lines to Ingredients

Click on the **Ingredients** tab. The ingredients in red are placeholder lines until you allocate a batch to them.

Double-click on each ingredient line to allocate stock.

Manually select a batch line, or click **Re-distribute all**, to automatically allocate a batch.

Click **OK** to return to the main window, or **OK & Next** to move to the next ingredient.

Reference: 22642021 Comment: For Dispensary Stock Colour: Black Invoice: 3 Date: 22/04/2021 Store: National Medical Wk

Item to build (double-click to edit): Enalapril 1mg/mL suspension

Ingredients (Bill of materials - Manufacturing Method)

Line	Item code	Item name	Qty	Pack	Batch	Expiry	Price	Price Exten
1	enval20	Enalapril 1mg tablet	1	1	none	0.00	0.00	
2	enval20	Enalapril 1mg tablet	1	1	none	0.00	0.00	

Buttons: Add Price holder, Re-distribute all, Re-checkup Sell Price

Buttons: New ingredient, Delete line, This is a projected build

## 7. Confirm the Build

### Confirm the Build

Review the build ingredients. The **Summary** shows the price of ingredients and sell price the new item. You can edit this by double-clicking on the Item to build.

Check the **Print** box to print a picking slip for the ingredients.

When you are ready to build the item, change the status to **Confirmed**.

Click **OK**, and **Confirm** when prompted.

Reference: 22642021 Comment: For Dispensary Stock Colour: Black Invoice: 3 Date: 22/04/2021 Store: National Medical Wk

Item to build (double-click to edit): Enalapril 1mg/mL suspension

Ingredients (Bill of materials - Manufacturing Method)

Line	Item code	Item name	Qty	Pack	Batch	Expiry	Price	Price Exten
1	enval20	Enalapril 1mg tablet	1	1	none	0.00	0.00	
2	enval20	Enalapril 1mg tablet	1	1	none	0.00	0.00	

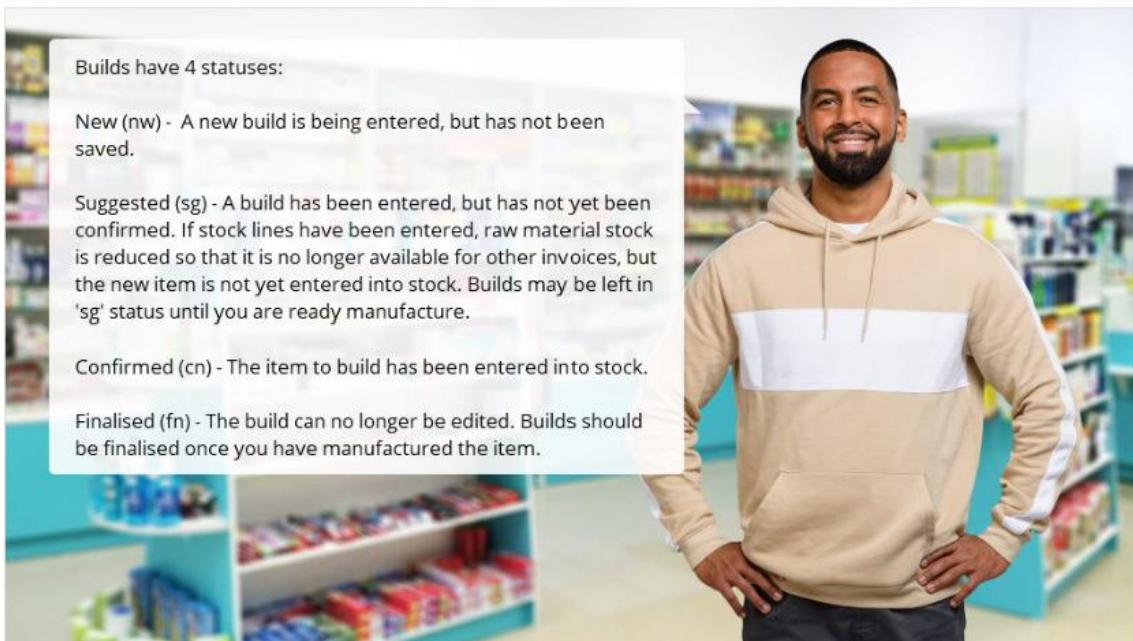
Buttons: Add Price holder, Re-distribute all, Re-checkup Sell Price

Buttons: New ingredient, Delete line, This is a projected build

## 8. Please refer to the online video slide for Finalise a Build.

[https://learn.msupply.foundation/pluginfile.php/1235/mod\\_scorm/content/1/res/data/video1.mp4](https://learn.msupply.foundation/pluginfile.php/1235/mod_scorm/content/1/res/data/video1.mp4)

## 9. Builds have 4 statuses



Builds have 4 statuses:

New (nw) - A new build is being entered, but has not been saved.

Suggested (sg) - A build has been entered, but has not yet been confirmed. If stock lines have been entered, raw material stock is reduced so that it is no longer available for other invoices, but the new item is not yet entered into stock. Builds may be left in 'sg' status until you are ready manufacture.

Confirmed (cn) - The item to build has been entered into stock.

Finalised (fn) - The build can no longer be edited. Builds should be finalised once you have manufactured the item.

**Step 3:** Appreciate the participants.

## Session 3.8: Miscellaneous Labels

### Objective:

By the end of this session, the participants should be able to demonstrate the ability to develop and print labels

Total Time: 30 minutes

S/N	Activity	Learning Methods	Time Allocated
1.	Brief Introduction	Lecture	5 minutes
2.	How to Develop and Print Labels	Interactive lecturette	25 minutes

### 1. Activity 1: Brief Introduction – 5 minutes

**Step 1:** Explain that the miscellaneous labels function allows you to create and save labels that you can print at any time from the label printer. This is particularly helpful for labels you print regularly, such as repack labels. Before you can print labels using this function, the printer must be set up and configured in mSupply.

### 2. Activity 2: How to Develop and Print Labels – 25 minutes

**Step 1:** In this session, we will be learning the step-by-step process of how to add a new label.

1. Open Miscellaneous Labels

## Open Miscellaneous Labels

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

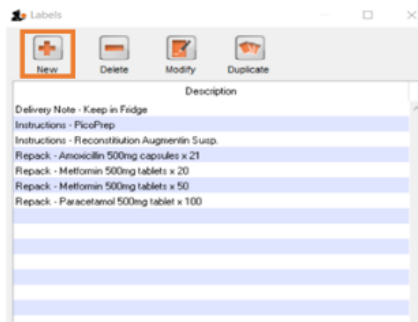


### 2. Add a New Label

#### Add a New Label

Click **New** to add a Label.

Your current Labels will be displayed in the Labels window. You can also Delete or Duplicate labels from this window.



### 3. Enter Label Details

## Enter Label Details

Enter the **Label name** and **Label details**.

Click **OK** to save the label.

**Step 2:** Now, let's look at the Add Label window in more detail. Tell participants to be very attentive.

### 1. Label Name

**Miscellaneous labels**

### Label name

This name is shown in the list of available labels when the Special > Misc labels menu item is chosen.

This field will not print on the label.



## 2. Label Details

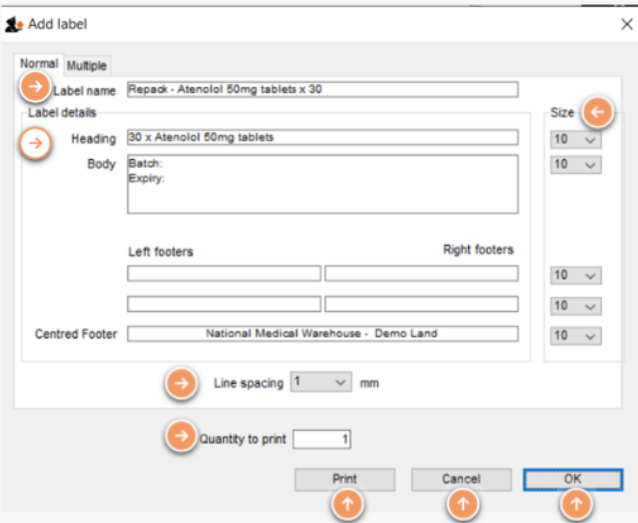
**Miscellaneous labels**

### Label details

These fields will print on the label in approximately the same position that they are on the screen.

Add a Heading for your label, and Body text and footers for additional information, such as instructions for use, batch, expiry or store details.

*Note that if you enter a very long left and right footer they may overlap in the middle of the label. Print a*



**Add label**

Normal Multiple

Label name Repack - Atenolol 50mg tablets x 30

Label details

Heading 30 x Atenolol 50mg tablets

Body Batch: Expiry:

Left footers Right footers

Centred Footer National Medical Warehouse - Demo Land

Size 10 10

Line spacing 1 mm

Quantity to print 1

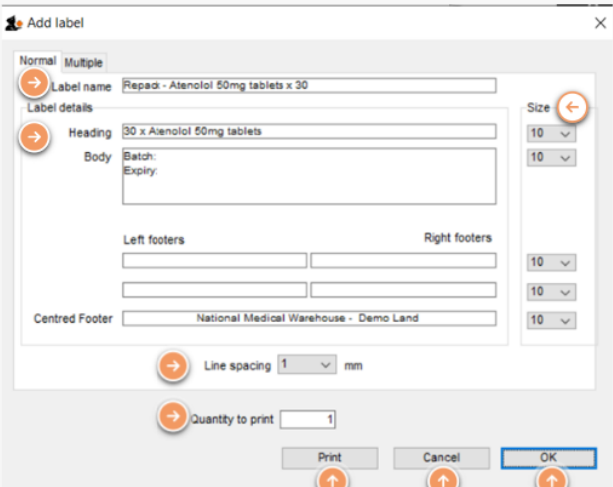
Print Cancel OK

## 3. Size

**Miscellaneous labels**

### Size

The font size you wish to use for each part of the label.



**Add label**

Normal Multiple

Label name Repack - Atenolol 50mg tablets x 30

Label details

Heading 30 x Atenolol 50mg tablets

Body Batch: Expiry:

Left footers Right footers

Centred Footer National Medical Warehouse - Demo Land

Size 10 10

Line spacing 1 mm

Quantity to print 1

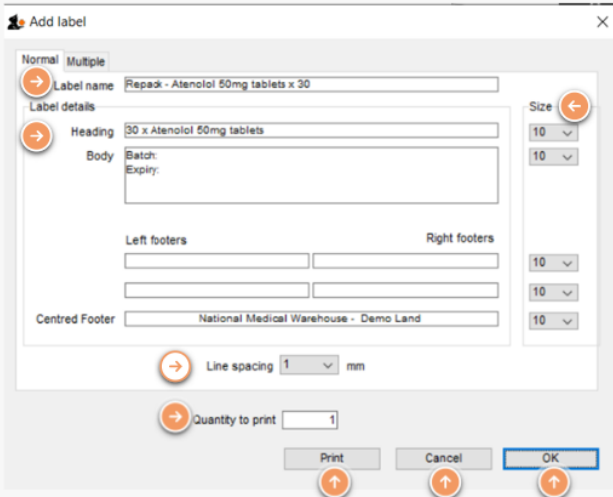
Print Cancel OK

#### 4. Line spacing

**Miscellaneous labels**

### Line spacing

The spacing you want between each line of text.



The 'Add label' dialog box is shown with the 'Normal' tab selected. The 'Label name' field contains 'Repack - Atenolol 50mg tablets x 30'. The 'Label details' section includes a 'Heading' field with '30 x Atenolol 50mg tablets' and a 'Body' field with 'Batch:' and 'Expiry:'. The 'Left footers' and 'Right footers' fields are empty. The 'Centred Footer' field contains 'National Medical Warehouse - Demo Land'. The 'Line spacing' field is set to '1' mm. The 'Quantity to print' field is set to '1'. The 'Print', 'Cancel', and 'OK' buttons are at the bottom.

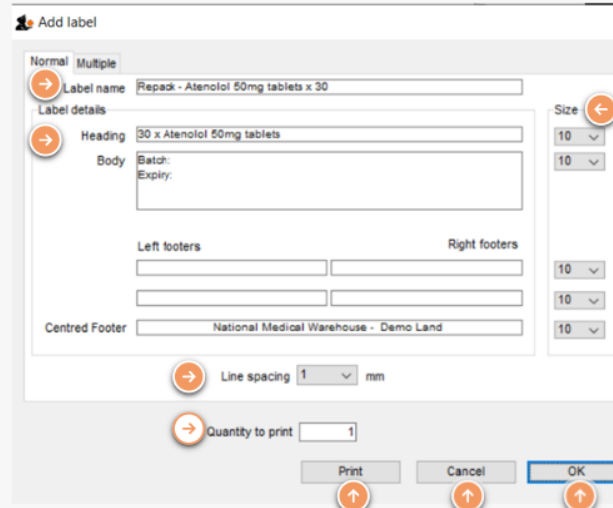
#### 5. Quantity to Print

**Miscellaneous labels**

### Quantity to print

Specify how many copies of this label you wish to print.

*Note that the quantity to print is not saved - it is reset to 1 each time you open the label.*



The 'Add label' dialog box is shown with the 'Normal' tab selected. The 'Label name' field contains 'Repack - Atenolol 50mg tablets x 30'. The 'Label details' section includes a 'Heading' field with '30 x Atenolol 50mg tablets' and a 'Body' field with 'Batch:' and 'Expiry:'. The 'Left footers' and 'Right footers' fields are empty. The 'Centred Footer' field contains 'National Medical Warehouse - Demo Land'. The 'Line spacing' field is set to '1' mm. The 'Quantity to print' field is set to '1'. The 'Print', 'Cancel', and 'OK' buttons are at the bottom.

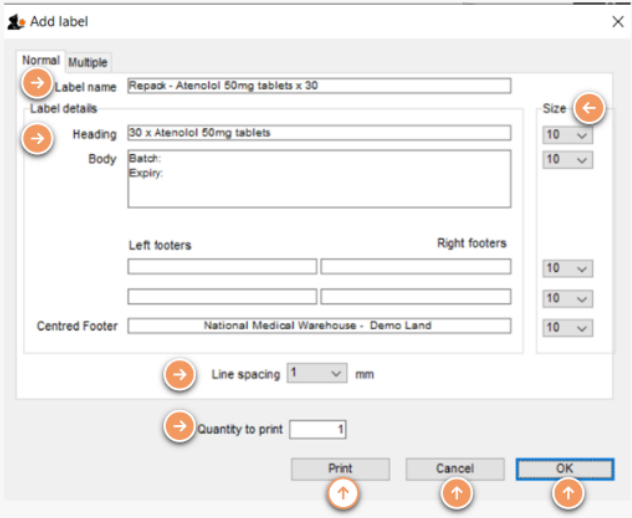
## 6. Print

**Miscellaneous labels**

### Print

Clicking this button will print to your default mSupply label printer.

It will print the number of labels specified in the Quantity to print field.



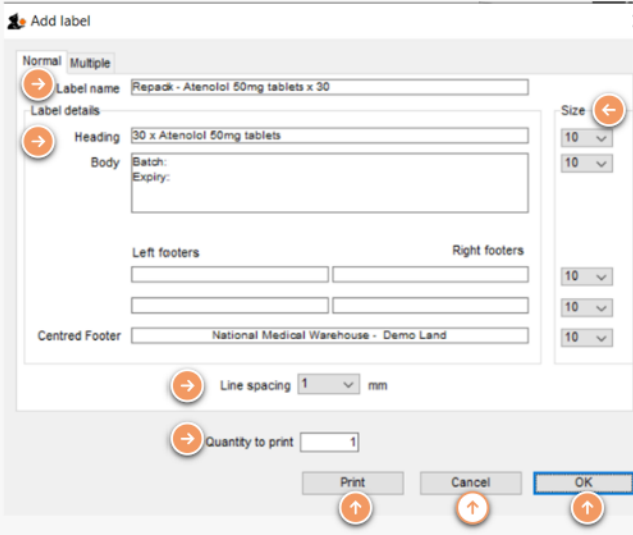
## 7. Cancel

**Miscellaneous labels**

### Cancel

Clicking Cancel will close the window without saving any changes you have made.

This is useful if you want to print labels without changing the preset label details.



## 8. Ok

**Miscellaneous labels**

**OK**

Clicking OK will save any changes you have made and close the window.

**Add label**

Normal Multiple

Label name Repack - Atenolol 50mg tablets x 30

Label details

Heading 30 x Atenolol 50mg tablets

Body Batch:  
Expiry:

Left footers Right footers

Centred Footer National Medical Warehouse - Demo Land

Size 10 10 10

Line spacing 1 mm

Quantity to print 1

Print Cancel OK

## 9. Summary

### Summary

Great! You have just created new labels for your store.



## Session 3.9: Basis Reports - Transactions

### Objectives:

By the end of this session, the participants should be able to:

1. Explain basic transaction reports
2. Demonstrate the ability to develop transaction reports

Total Time: 60 minutes

S/N	Activity	Learning Methods	Time Allocated
1.	Brief Introduction	Lecture	5 minutes
2.	How to Develop Transaction Reports	Interactive lecturette	55 minutes

### 1. Activity 1: Brief Introduction – 5 minutes

**Step 1:** Explain that the transaction report summarises supplier, customer and patient transaction data from your store.

**Step 2:** When you open the transaction report window, there are many reports to choose from (and we mean many) and filters you can apply. We will work through some of these reports shortly.

### 2. Activity 2: How to Develop Transaction Reports – 55 minutes

**Step 1:** Inform participants that we will look at the transaction report window in further detail.

## 1. Type of report

### Basic Reports - Transactions

#### Type of report

Here you can select which transaction report you want to use. Each report generates different types of data and will include varying combinations of names (stores, customers, or suppliers), items, values (\$) and quantities (item units).

Once you have selected the report type, you will then add filters and dates according to your need. The filters that do not apply to certain reports will be hidden as required.

## 2. Transaction type:

### Basic Reports - Transactions

#### Transaction type

In the first drop down list, you can choose which transactions to report on, for example:

- **Sales to customers:** customer invoices i.e. transactions of type ci
- **Purchases from suppliers:** supplier invoices i.e. transactions of type si

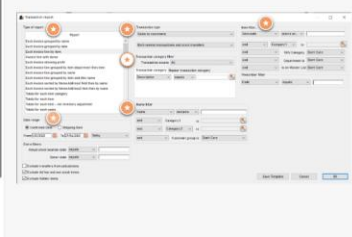
In the second drop down list, you can select to report on normal transactions (ie external customers and suppliers) and/or stock transfers (ie internal

## 3. Transaction category filter

**Basic Reports - Transactions**

**Transaction source:** This allows you to select the source the transactions must belong to: 'Customers, Suppliers and/or Patients. For example, if you select Patients, only transactions with a patient name will be included in the results (e.g. prescriptions).

**Transaction category:** Use the magnifying glass to choose the transaction categories to include in the report (for example, Regular vs Supplementary customer invoices, or inpatient vs Outpatient prescriptions if these have been set up in your system).



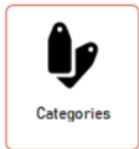
#### 4. Name Filter

**Basic Reports - Transactions**

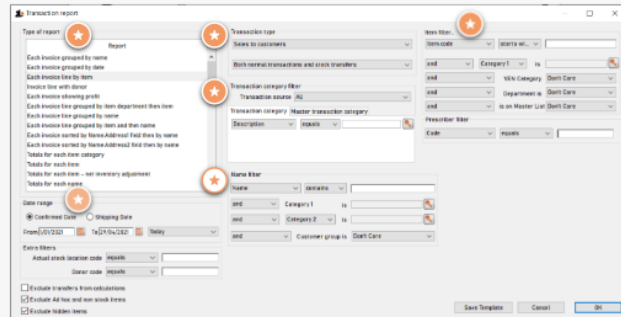
**Name filter**

You can enter the Name or Code of the Customer, Supplier or Patient you want to report on.

You can also report on the Customer or Supplier category, if you have these set up in your store.



**Categories**



#### 5. Item filter

## Basic Reports - Transactions

### Item filter

Here you can specify the items or item categories to include in the report.

**Step 2:** Now, let's take a look at some of the commonly used transaction reports in mSupply. Introduction: You have been asked to prepare a report showing the monetary value of stock issued to each facility from January – December 2020.

This information will be used to assess whether a facility consumed significantly more or less than planned and, if so, why.

## 1. Open Report – Transactions

### Open Reports - Transactions

Navigate to the **Reports** tab and click on **Transactions**.





## 2. Select Report Type and enter Date Range

### Select Report Type and enter Date Range

In the **Type of Report** box, select **Totals for each name**. This report tells you the monetary value of stock issued to each facility in a specific timeframe.

In the **Date range** section, set the timeframe for your report (choose from the drop-down menu or manually enter the date range).

Ensure the **Exclude transfers from calculations** box is **NOT** ticked.

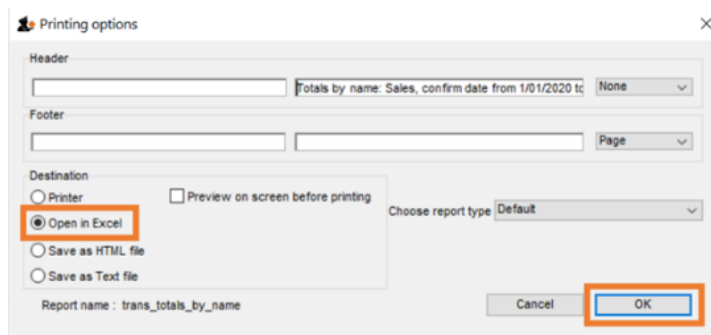
Click **OK**.



## 3. Export to Excel

### Export to Excel

Select **Export to Excel** and click **OK**.



**Step 3: Report: Total value of stock issued.** Let's examine the different components of this report and what it tells us.

## 1. Report Title

**Report: Total value of stock issued**

	A	B	C
1		Totals by name: Sales, confirm date from 1/01/2020 to 31/12/2020: for store(s) National Medical Warehouse	
2			
3	Name	Transac	Value
4	Balwyn Warehouse		12 58600
5	Thornbury Warehouse		11 60705
6	Total		23 119305

**Report Title**

Report title including date range (the title may be edited)

## 2. Name

**Report: Total value of stock issued**

	A	B	C
1		Totals by name: Sales, confirm date from 1/01/2020 to 31/12/2020: for store(s) National Medical Warehouse	
2			
3	Name	Transac	Value
4	Balwyn Warehouse		12 58600
5	Thornbury Warehouse		11 60705
6	Total		23 119305

**Name**

This column tells you the customers (facilities) to whom stock was issued

### 3. Transaction count

**Report: Total value of stock issued**

**Transaction count**

This column tells you the total number of transactions issued to the facility

	A		C
1		Totals by name: Sales, confirm date from 1/01/2020 to 31/12/2020: for	
2			
3	Name	Transaction Count	Value
4	Balwyn Warehouse	12	58600
5	Thornbury Warehouse	11	60705
6	Total	23	119305

### 4. Value

**Report: Total value of stock issued**

	A	B	C
1		Totals by name: Sales, confirm date from 1/01/2020 to 31/12/2020: for	
2			
3	Name	Transaction Count	Value
4	Balwyn Warehouse		58600
5	Thornbury Warehouse		60705
6	Total		119305

**Value**

This column tells you the total monetary (\$) value of all transactions issued to the facility

### 5. Total

**Report: Total value of stock issued**

	A		C
1		Totals by name: Sales, confirm date from 1/01/2020 to 31/12/2020: for	
2			
3	Name	Transaction Count	Value
4	Balwyn Warehouse	12	58600
5	Thornbury Warehouse	11	60705
6	Total	23	119305

**Total**

This row gives you the overall Total Transaction Count and Total Value of Stock Issued to all facilities

## 6. Summary

---

### Summary

Both Balwyn Warehouse and Thornbury Warehouse received approximately \$60,000 worth of stock in the year 2020.

They were expected to spend ~\$50,000 each for that calendar year - this means they spent more than predicted in the budget. It's important to find out why (but that's beyond the scope of this module!).

This information can be used to help estimate future financial needs and budgets.




**Step 4:** Let's look at step-by-step to generate a report on antibiotic usage, which shows the total quantities of each item issued to each facility so far this year.

### 1. Go to Reports – Transaction

---

**Go to Reports - Transactions**

Navigate to the **Reports** tab and click the **Transactions** button.

The screenshot shows the mSupply navigator web application. At the top, there is a navigation bar with icons for Customer, Suppliers, Item, Reports, Special, and Admin. The 'Reports' icon is highlighted with an orange box. Below the navigation bar, the main content area is divided into several sections. The 'Transactions' section is highlighted with an orange box and contains a list of items: Transactions, Purchase orders, and Purchases. Other sections include 'Stock and items', 'Management', 'Requisitions', 'Debit/Credit', 'Saved reports', and 'Others'.

### 2. Select Report Type and apply relevant filters

## Select Report Type and apply relevant filters

In the **Type of Report** box, select **Cross-tab: items in rows, names in columns, quantity in cells**. This report shows the total quantities of each item issued to each facility in a specific timeframe.

Apply the required **date range**.

Ensure the **Exclude transfers from calculations** box is **NOT** ticked.

Use the **Item filter** to select the items you wish to report on. In this example, antibiotics have been set up as a **Flag**.

Click **OK**.

Transaction report

Type of report: Cross-tab: items in rows, names in columns, quantity in cells

Transaction type: Sales to customers

Item filter: Flag starts with Antibiotic

and Category 1

### 3. The Report viewed in Excel

Report - Total Quantities of Items issued to each facility

	A	B	C	D	E	F
			Hawthorn East Clinic	Kerang Hospital	Mont Albert CHC	Sandstone Private Pharmacy
1						
2	Amoxicillin 500mg tablet		90	490	130	90
3	Ceftriaxone 1g injection		5	20	0	0

Items  
This column tells you the names of the items supplied

Report - Total Quantities of Items issued to each facility

	A	B	C	D	E	F
		Units	Hawthorn East Clinic	Kerang Hospital	Mont Albert CHC	Sandstone Private Pharmacy
1						
2	Amoxicillin 500mg tablet	ea	90	490	130	90
3	Ceftriaxone 1g injection	ea	5	20	0	0

Customers  
This row tells you which customers (facilities) stock was issued to


Quantities  
The values in these cells tell you how much of each item was issued to each customer over the required time period

#### 4. Summary

### Summary

In this example, you can see that Kerang Hospital is requesting more amoxicillin and ceftriaxone than the other customers. This makes sense as they are a large hospital and would be treating more patients than the other facilities.

You can also use this report to compare actual item usage shown in the report vs. estimated consumption, and assess whether the stock provided was sufficient to meet needs. Determine whether the facility consumed significantly more or less than planned



**Step 5:** This time you've been asked to produce a report showing the total quantities of each item on the Tuberculosis program issued from your store, broken down into quarters.

**Step 6:** Let's look at how to generate this report. Use the link below.

[https://learn.msupply.foundation/pluginfile.php/1239/mod\\_scorm/content/1/res/data/video1.mp4](https://learn.msupply.foundation/pluginfile.php/1239/mod_scorm/content/1/res/data/video1.mp4)

Let's look at the Report: Total quantity of stock issued from a facility – Quarterly breakdown.

Report: Total quantity of stock issued from a facility - quarterly breakdown

	A	B	C	D
		Units	2021 Q1	2021 Q2
1				
2	isoniazid 300mg tab	Items		400
3	Rifampicin 300mg tab	This column tells you which items were issued.		400
4	Ethambutol 400mg tab			300
5	Pyrazinamide 500mg tab			300


Report: Total quantity of stock issued from a facility - quarterly breakdown

	A	B	C	D
			2021 Q1	2021 Q2
1				
2	isoniazid 300mg tab	First Quarter	600	400
3	Rifampicin 300mg tab	This column tells you how many of each item were issued during the first quarter (Q1) of 2021.	500	400
4	Ethambutol 400mg tab		500	300
5	Pyrazinamide 500mg tab		400	300

Report: Total quantity of stock issued from a facility - quarterly breakdown

	A	B	C	D
				2021 Q2
1				
2	isoniazid 300mg tab	Second quarter		400
3	Rifampicin 300mg tab	This column tells you how many of each item were issued during the second quarter (Q2) of 2021.		400
4	Ethambutol 400mg tab			300
5	Pyrazinamide 500mg tab			300

### Summary



By comparing actual item usage per quarter or month as shown in the report vs. estimated consumption, you can assess whether the stock available at the supplying facility was sufficient to meet needs.

Determine whether the facility issued significantly more or less stock than planned during each period and, if so, why.

Consider whether there were shortages or stockouts at higher levels that impacted supply at certain times. This

## Step 7: We will be learning the step-by-step process of **Saving Report Templates**

### 1. Create a template

**Create a template**

To create a report template, simply choose a report to run, apply the filters you wish, and click **Save Template**.

### 2. Save Template

#### Save Template

**Report name:** Enter the name the report will have in mSupply. Make it meaningful so you know what report you're running when selecting it.

**Comment:** Add anything you want to remember about the template and you want others to see. You could enter the purpose of the report or why the template was created.

**View preferences:** Check the Public checkbox if you want all users to be able to see the template in the list and therefore run it. If you leave it unchecked then this template will only be visible, and therefore runnable, by you.

**Edit preferences:** Check the Public checkbox if you want all users to be able to edit this window (please note this only changes this window, not the actual filter settings made on the previous screen)

When you are done, click **OK**.

### 3. Running a saved template

#### Running a saved template

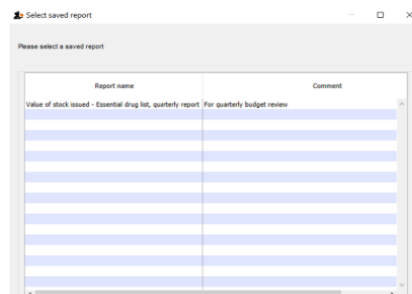
Navigate to the **reports** tab and click on **Run saved report**.



### 4. Select the template

#### Select the template

Click on the report you wish to run, then click **OK**.



### 5. Editing and deleting the template

#### Editing and Deleting templates

If you wish to edit or delete your saved report templates, navigate to the **Reports** tab and click on **Manage saved reports**.



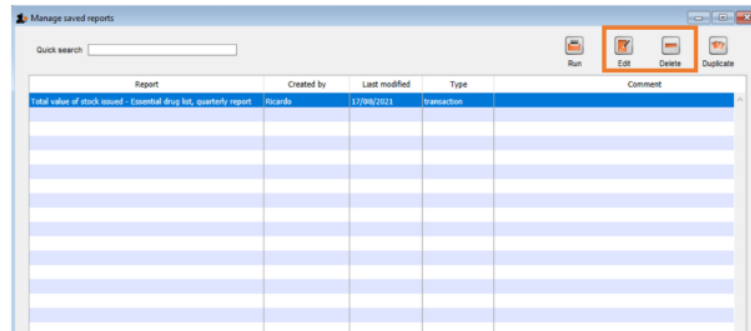


## 6. Select the report

### Select the report

Select the report you wish to modify, then click on the appropriate **Edit** or **Delete** button.

Then, follow the prompts.



**Step 8:** Conclude this session by appreciating the participants

## Session 3.10: Basis Reports – Stock and Items

### Objectives:

By the end of this session, the participants should be able to:

1. Explain basic reports for stock and items
2. Demonstrate the ability to develop basic reports for stock and items

Total Time: 60 minutes

S/N	Activity	Learning Methods	Time Allocated
1.	Brief Introduction	Lecture	5 minutes
2.	How to Develop Stock and Items Reports	Interactive lecturette	55 minutes

### 1. Activity 1: Brief Introduction – 5 minutes

**Step 1:** Explain that the stock and item reports are useful for reporting on item values, quantities or usage. You can print any of these reports or export them to Excel.

### 2. Activity 2: How to Develop Stock and Items Reports – 55 minutes



**Step 1:** Tell participants that we will quickly look at what each report shows before examining some reports in greater detail.

## 1. Show total stock value

**Basic Reports - Stock and Items**

**▼ Show total stock value**

This report shows the total monetary value of stock in your store.

 mSupply alert ×  
Cost price of stock on hand for store National Medical Warehouse:  
89,070  
 OK

You can also add filters if you only want to include particular items or categories in the value displayed.

## 2. Current stock

**Basic Reports - Stock and Items**

**▼ Current stock**

This report shows you the stock quantity for each item in your store, or across multiple stores. It can be used to calculate the % availability of items in your store and across different levels of the health system; we will look at this calculation in more detail shortly.

The report will show each item with stock >0 that is **Available**.

Location	Item code	Item name	Total\quantity
BLUE	amo500t	Amoxicillin 500mg tab	4400
BLUE	cefz250i	Ceftriaxone 250mg inj	4000
BLUE	chl100t	Chloroquine phosphate 100mg (base) tab	7000
BLUE	chl150s	Chloroquine phosphate 50mg/5ml syrup	2000
BLUE	dia5t	Diazepam 5mg tab	8000
BLUE	enal1s	Enalapril 1mg/ml suspension	200
BLUE	enal20t	Enalapril 20mg tablet	80
BLUE	ibu200t	Ibuprofen 200mg tab	9000
BLUE	iso300t	Isoniazid 300mg tab	8000
BLUE	mef250t	Mefloquine 250mg tab	4000
BLUE	met500t	Metformin 500mg tab	9000

## 3. Stock on date

## Basic Reports - Stock and Items

### Stock on date

This reports shows you the quantity and value (\$) of stock in your store on a specified date.

## 4. Item list

## Basic Reports - Stock and Items

### Item list

This report allows you to view all items in your store, including the location and stock on hand.

Item list report: for store(s) National Medical Warehouse			
code	item name	Item Location	Stock on hand
amo500t	Amoxicillin 500mg tab	A1:1 Shelf	4400
cefx250i	Ceftriaxone 250mg inj	A1:1 Shelf	4000
chlpl100t	Chloroquine phosphate 100mg (base) tab	A1:1 Shelf	7000
chlpl50s	Chloroquine phosphate 50mg/5mL syrup	A1:1 Shelf	2000
dia5t	Diazepam 5mg tab	A1:1 Shelf	8000
enal1s	Enalapril 1mg/mL suspension	A1:1 Shelf	200
enal20t	Enalapril 20mg tablet	A1:1 Shelf	80
ibu200t	Ibuprofen 200mg tab	A1:1 Shelf	9000
iso300t	Isoniazid 300mg tab	A1:2 Shelf	8000
mef250t	Mefloquine 250mg tab	A1:2 Shelf	4000
met500t	Metformin 500mg tab	A1:2 Shelf	9000
met500i	Metronidazole 500mg/100mL inj	A1:2 Shelf	4000
par500t	Paracetamol 500mg tab	A1:2 Shelf	10000
prl75t	Primaquine diphosphate 7.5mg tab	B1:1 Shelf	6000
rlil1s1t	Rifampicin 150mg + isoniazid 150mg tab	B1:1 Shelf	5000

## 5. Item usage

### Item usage

This report displays a facility's average consumption (usage) of each item per month, based on previous usage within a given timeframe. It also shows how long the current stock on hand will last (months cover) based on previous consumption rates.

More on this later!

## 6. Item slow moves

### Basic Reports - Stock and Items

#### Item slow movers

This report displays items over the maximum stock threshold you want in your store.

It shows items that have more than X months stock on hand; this figure (X) depends on your desired stock turnover. For example, if you are turning your stock over twice a year, you might want to know about items that have more than 12 months of stock.

The screenshot shows a dialog box titled 'Item slow movers' with a close button (X). It contains several configuration options for generating a report:

- Report on items whose...** (dropdown menu)
- Item code** (text input field)
- starts with** (dropdown menu)
- Category 1** (dropdown menu)
- is** (dropdown menu)
- Department is** (dropdown menu)
- VEN Category** (dropdown menu)
- is on Master List** (dropdown menu)
- and donor** (dropdown menu)
- equals** (dropdown menu)
- Base analysis on** (dropdown menu)
- Months of usage data** (text input field)
- Report on items that have more than** (text input field)
- months stock on hand** (text input field)
- Open report in Excel** (checkbox)
- Save Template** (button)
- Cancel** (button)
- OK** (button)

## 7. Location report

### Basic Reports - Stock and Items

#### Item slow movers

#### Location report

If you set volumes for locations and items in your store, this report shows you how much space each location has available for stock, based on its capacity (m<sup>3</sup>).

Location summary report Ministry of Health						
						Page 1 of 1
Location	Description	Type	Capacity	Used	Available %	Store
BLUE	Blue Shelf		50	0	20	National Medical Warehouse
RED	Red Shelf		100	0	80	National Medical Warehouse

**Step 2:** That was a quick introduction to stock and items reports.

**Step 3:** Let's move to another report.

You have been asked to review the usage of items on your essential Drug List, to determine how long your current stock on hand will last and whether you will need to order more.

Fortunately, you know there's a report that can do this. Allow participants to view the video slides with the link below.

[https://learn.msupply.foundation/pluginfile.php/1240/mod\\_scorm/content/1/res/data/video1.mp4](https://learn.msupply.foundation/pluginfile.php/1240/mod_scorm/content/1/res/data/video1.mp4)

## Item Usage Report in excel

**Report Title**  
The title of the report including filter and store details

**Store**  
This column tells you the name of the store

**Item Code**  
This column tells you the item code

**Item Name**  
This column tells you the name of the items produced in this report

**VEN Categories**  
This column tells you which VEN (Vital, Essential, Necessary) category the item belongs to, if this information has been entered into your system.

**Stock on Hand**  
This column tells you how much stock you currently have in your store

**Stock On Order**  
This column tells you how much stock you have on order.  
Note that Stock On Order data is generated from Purchase Orders only - so if you've requested stock from an internal order, that information will not show here.

**AMC**  
These columns show the AMC, or Average Monthly Consumption (usage), over the last 12 months, 24 months, and 6 months, respectively.

**Months of Stock Cover**  
This column tells you how many Months of Stock Cover you have remaining, based on your Stock on Hand and your AMC (in this case, based on 6 months of usage data).  
If you weren't expecting another order to arrive until 6 months in the future but you can see you only have 4 months of ciprofloxacin and metformin remaining, you would look into measures to prevent a stockout.

**Monthly Usage**  
These columns give you more recent usage data; monthly usage quantities from 3 months ago, last month and this month, respectively.

**Item Usage Report**

Item usage [Excel] report (Based on last 6 months of usage data)

State	Item Code	Item Name	VEN	Stock on Hand	Stock on Order	AMC 12 mths
National Medical Warehouse	ama5000	Amoxicillin 500mg tablet		410	0	2
National Medical Warehouse	capro5000	Cephalexin 500mg tablet		450	0	6
National Medical Warehouse	lac2000	Lamivudine 300mg tablet		9,600	0	2
National Medical Warehouse	met5000	Metformin 500mg tablet		100	500	1
National Medical Warehouse	#1234	Reference 1234567890		5,600	0	1

**Expiring in 6 or 12 months**

These columns tell you how much stock will be expiring in 6 or 12 months, respectively.

Warehouse	Exp. in 6 mths	Exp. in 12 mths
National Medical Warehouse	0	310
National Medical Warehouse	0	450
National Medical Warehouse	0	50
National Medical Warehouse	0	0
National Medical Warehouse	0	100

### Summary

The average monthly consumption (AMC) is required to calculate months cover, which is essential in assessing stock status at individual facilities and national levels. This information can be used to determine if a facility is over-, under- or adequately stocked and adjust future orders as required. Managers can study the AMC, months cover and order cycles to determine whether shortages or stockouts are likely and plan accordingly. They can also reduce wastage by redistributing stock from oversupplied stores to high-consumption facilities.



**Step 4:** Let's learn how to set up a Basket of Goods (Critical Items) in your store. This will be used to calculate Medicines Available. Tell participants they will need the Basket of Goods list ready for this.

Creating a Basket of Goods.

1. Navigate to the Item tab

**Navigate to the Items tab**

Navigate to the **Items** tab and click on the **Items List** button.

2. Find the Item

Search for your item, then click **OK**.

### 3. Select the Item

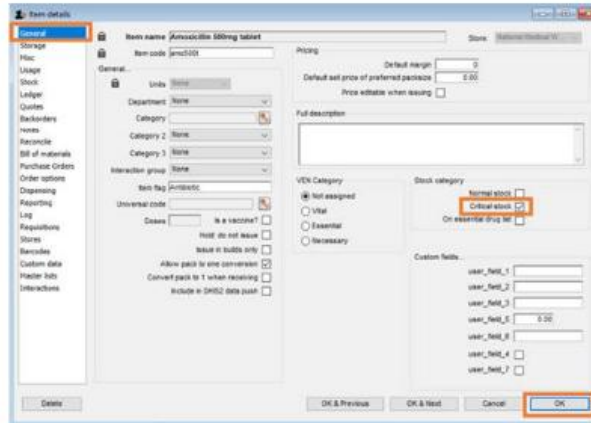
Double click on the item to open the **Item Details** window.

4. Check the critical stock checkbox



## Check the Critical stock checkbox

In the **Item** details window on the **General** tab, check the **Critical stock** checkbox, then click **OK**.

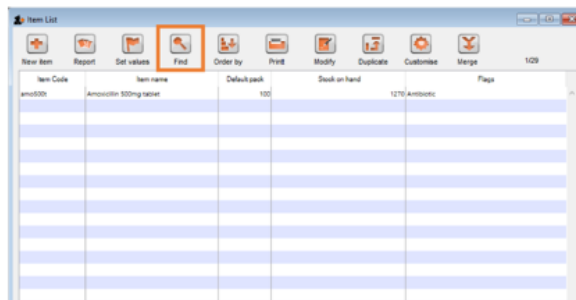


### 5. Search for your next item

#### Search for your next item

You will then go back to the **Item List** window. You can search for your next item by clicking the **Find** button.

Repeat this process until all the items in your Basket of Goods have been checked as Critical stock.



### 6. Summary: You have created a Basket of Goods in mSupply. Next you will see how to review your Basket of Goods

[https://learn.msupply.foundation/pluginfile.php/1240/mod\\_scorm/content/1/res/data/video2.mp4](https://learn.msupply.foundation/pluginfile.php/1240/mod_scorm/content/1/res/data/video2.mp4)

**Critical Items List**

**Critical Items List**

## Critical Items List

	A	B	C	D
1	Item list report: Critical stock equals Item, for store(s) National Medical Warehouse			
2				
3	code	Item name	Item Location	Stock on hand
4				
5	amc500s	Amoxicillin 500mg tablet		
6	calu250	Calcitriol 250mg injection		
7	clm400	Clindamycin 400mg tablet		
8	ethu300	Ethambutol 300mg tab		
9	etu400	Ethambutol 400mg tab		
10	ibu300m	Ibuprofen 300mg tab		
11	iso150	Isoniazid 150mg tab		
12	iso300	Isoniazid 300mg tab		
13	iso600	Isoniazid 600mg tab		
14	mef250	Mefenquine 250mg tab		
15	mer500	Mefenquine 500mg tab		
16	mer1000	Mefenquine 1000mg tab		
17	par500	Paracetamol 500mg tab		
18	pyr400	Pyrimethamine 400mg tab		
19	iso150	Isoniazid 150mg + Isoniazid 150mg tab		
20	iso150	Isoniazid 150mg + Isoniazid 150mg tab		
21	iso150	Isoniazid 150mg + Isoniazid 150mg tab		
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Critical Items List				
	A	B	C	D
1		Item report. Critical stock equals True, for stores\ National Medical Warehouse		
2				
3	code	Item name	Item Location	Stock on hand
4	ama000	Amoxicillin 500mg tab		1270
5	refe250	Ceftriaxone 250mg injection		200
6	flu010	Endaprep 10mg tablet		990
7	etha300	Ethambutol 100mg tab		1120
8	etha400	Ethambutol 400mg tab		560
9	ibu200	Ibuprofen 200mg tab		200
10	iso100	Isoniazid 100mg tab		3000
11	iso300	Isoniazid 300mg tab		300
12	mef250	Mefloquine 250mg tab		0
13	mef500	Mefloquine 500mg tab		2200
14	meo000	Moxonidone 400mg tab		0
15	par000	Paracetamol 500mg tab		4000
16	pyr000	Pyrimethamine 50mg tab		5000
17	rlf150	Rifampicin 150mg cns		0
18	rlf170	Rifampicin 150mg cns		10000
19	rlf100	Rifampicin 150mg cap		0
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**Critical Items List**

	A	B	C	D
1		Item list report - Critical stock equals True, for item(s) National Medical Warehouse		
2				
3	code	item name	Item Location	Stock on hand
4				
5	amc1000	Amoxicillin 500mg tablet		1270
6	sulfu23			200
7	f-mat10			900
8	f-mat10			1120
9	f-mat10			150
10	flu200			200
11	flu100			3000
12	flu1000			350
13	mfu250			0
14	mfu50			2200
15	mfu50			0
16	par500			4000
17	Par-500			1000
18	flu151	flutemepin 150mg + formicoid 150mg tab		0
19	flu17	flutemepin 150mg + formicoid 75mg tab		0
20	mf1500	flutemepin 150mg tab		10000
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**Item Location**

This column tells you the item's location, if that information has been entered into the system.

Items and codes

Back

	A	B	C	D
1		Item list report: Critical stock equals zero, for store(s)/National Medical Warehouse		
2				
3	code	Item name	Item Location	Stock on hand
4				
5	ame500	Isoniazid 500mg tablet		1731
6	erbu750	Ethambutol 750mg injection		200
7	etu10	Ethambutol 150mg		999
8	etu100	Ethambutol 100		1135
9	etu400	Ethambutol 40		560
10	isu200	Isoniazid 200		200
11	isu300	Isoniazid 300		3000
12	isu300	Isoniazid 300		301
13	me750	Metformin 750		20
14	me750	Metformin 750		2200
15	me750	Metformin 750		20
16	par500	Paracetamol 500		4000
17	pyr400	Paracetamol 500mg tab		5000
18	rlf150	Rifampicin 150mg + Isoniazid 150mg tab		0
19	rlf150	Rifampicin 150mg + Isoniazid 150mg tab		0
20	rlf750	Rifampicin 750mg + Isoniazid 750mg tab		10000
21				
22				
23				
24				
25		Items and codes		

This column tells you how much stock you have.


### 1. Current Stock Report:

**Calculating Medicines Availability**

**1**

## Current stock Report

Navigate to the **Reports** tab and click **Current stock**.



The screenshot shows the mSupply navigator interface. The 'Reports' tab is selected and highlighted with a red box. Under the 'Reports' tab, the 'Current stock' option is highlighted with a red box. The interface also shows other tabs like Customer, Suppliers, Items, Special, and Admin. The 'Current stock' report is listed under the 'Stock and items' category.

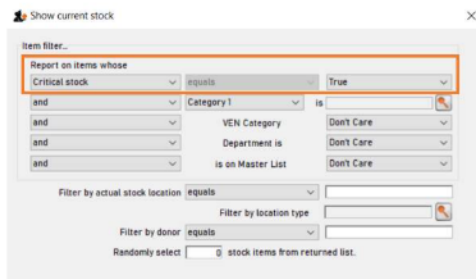
## 2. Apply item filters and report format

### Apply item filters and report format

In the first Item filter field, select **Critical stock**.

In the **Report format** box, select **Total stock for each item**.

Check **Open report in Excel** and click **OK**.



The screenshot shows the 'Show current stock' dialog box. The 'Item filter...' section is highlighted with a red box. It contains a table of filters:

Report on items whose	operator	value
Critical stock	equals	True
and	Category 1	is
and	VEN Category	Don't Care
and	Department is	Don't Care
and	is on Master List	Don't Care

Below the filters, there are sections for 'Filter by actual stock location', 'Filter by location type', and 'Filter by donor'. The 'Randomly select' checkbox is also present.

## 3. Export to Excel

**Calculating Medicines Availability**

- 1
- 2
- 3
- 4
- 5

### Export to Excel

When prompted, select **Export to Excel** and click **OK**.

Printing options

Form to use: Stock take total by name location ☐ Remember this choice

Message

Destination

- ☐ Printer
- ☐ Preview
- ☐ PDF file on disk
- ☐ Email PDF
- ☒ Export to Excel

Cancel OK

#### 4. Count the number of critical items

**Calculating Medicines Availability**

- 1
- 2
- 3
- 4
- 5

### Count the number of critical items

The current stock report only shows critical items with stock on hand.

Highlight the number of rows with items in them and Excel will tell you how many there are (or manually count them if you like).

In this example, there are 12 critical items with stock available.

	A	B	C	D
1	<b>Stock totals for each item for store(s) National Medical Warehouse</b>			
2	<b>Location</b>	<b>Item code</b>	<b>Item name</b>	<b>Total quantity</b>
3	ORALS	amo500t	Amoxicillin 500mg tablet	1270
4	INJECTIONS	cefs250i	Ceftriaxone 250mg injection	200
5	ORALS	Enal10	Enalapril 10mg tablet	990
6	ORALS	Etha100	Ethambutol 100mg tab	1120
7	ORALS	Etha400	Ethambutol 400mg tab	560
8	ORALS	ibu200t	Ibuprofen 200mg tab	200
9	ORALS	Ison100	Isoniazid 100mg tab	3000
10	ORALS	Ison300t	Isoniazid 300mg tab	300
11	ORALS	met500t	Metformin 500mg tab	2200

#### 5. Calculate medicines availability for a single store

## Calculating Medicines Availability

1

### Calculate medicines availability for a single store

Use the following formula to calculate Medicines Availability (%)

2

$$\text{Store level: \% Availability} = \frac{\text{Number of Available critical items}}{\text{Total number of critical items}} \times 100$$

3

In this example:

4

Number of available critical items = 12

Total number of critical items = 16

5

$$\begin{aligned} \text{So \% Availability} &= \frac{12}{16} \times 100 \\ &= 0.75 \times 100 \end{aligned}$$

**Step 8:** Next, we will look at how to produce a Current Stock report across multiple stores. Only supervisors can have this kind of access. Tell participants to use the link below to watch the slide video.

[https://learn.msupply.foundation/pluginfile.php/1240/mod\\_scorm/content/1/res/data/video3.mp4](https://learn.msupply.foundation/pluginfile.php/1240/mod_scorm/content/1/res/data/video3.mp4)

## Current Stock Report and National Medicines Availability

### 1. Review Report.

#### Review Report

This is what a Current Stock Report of critical items across multiple stores looks like:

Item Code	Item Name	Hawthorn East Clinic	Kerang Hospital	National Medical Warehouse	Thornbury Warehouse	Total
4. iso300	Isoniazid 300mg tab	0	9600	200	0	9900
5. met500t	Metformin 500mg tab	0	100	2200	0	2300
6. cefx250i	Ceftriaxone 250mg injection	0	10	200	0	210
7. pyri500	Pyriminazole 500mg tab	0	0	5000	0	5000
8. Etas10	Etasol 10mg tablet	0	0	990	0	990
9. ibu200t	Ibuprofen 200mg tab	0	0	200	0	200
10. Iso100	Isoniazid 100mg tab	0	0	3000	0	3000
11. rif150t	Rifampicin 150mg tab/cap	0	5600	10000	0	15600
12. Etha100	Ethambutol 100mg tab	0	0	1120	0	1120
13. met500i	Metronidazole 500mg/100ml. inj	0	200	0	0	200
14. amc500t	Amoxicillin 500mg tablet	2000	410	1270	1200	4880
15. par500	Paracetamol 500mg tab	2000	331	4690	49	8060
16. Etha400	Ethambutol 400mg tab	0	0	560	0	560

#### Current Stock Report and National Medicines Availability

1

2

13. met500i	Metronidazole 500mg/100ml. inj	0	200	0	0	200
14. amc500t	Amoxicillin 500mg tablet	2000	410	1270	1200	4880
15. par500	Paracetamol 500mg tab	2000	331	4690	49	8060
16. Etha400	Ethambutol 400mg tab	0	0	560	0	560

As you can see, Hawthorn East Clinic has 2 critical items available, Kerang Hospital has 7 items available, National Medical Warehouse has 12 items available, and Thornbury Warehouse has 2 items available.

You can calculate the % Medicines Availability for each facility using the same formula shown before.

After you do this, you'll see the % medicines availability is:

- 12.5% at Hawthorn East Clinic
- 43.75% at Kerang Hospital
- 75% at National Medical Warehouse
- 12.5% at Thornbury Warehouse

### 2. Calculating National % Medicines Availability

#### Current Stock Report and National Medicines Availability

1

2

#### Calculating National % Medicines Availability

To calculate % Medicines Availability at the National level, use the following formula:

$$\text{National \% Medicines Availability} = \frac{\text{Sum of \% Availability at all facilities}}{\text{Total number of facilities}}$$

Let's calculate the National % Medicines Availability in this example.

The % availability at each facility was:

- 12.5% at Hawthorn East Clinic
- 43.75% at Kerang Hospital
- 75% at National Medical Warehouse
- 12.5% at Thornbury Warehouse

There are 4 facilities in total.

$$\text{National \% Medicines Availability} = \frac{12.5 + 43.75 + 75 + 12.5}{4}$$

#### Current Stock Report and National Medicines Availability

1

2

$$\text{National \% Medicines Availability} = \frac{\text{Sum of \% Availability at all facilities}}{\text{Total number of facilities}}$$

Let's calculate the National % Medicines Availability in this example.

The % availability at each facility was:

- 12.5% at Hawthorn East Clinic
- 43.75% at Kerang Hospital
- 75% at National Medical Warehouse
- 12.5% at Thornbury Warehouse

There are 4 facilities in total.

$$\text{National \% Medicines Availability} = \frac{12.5 + 43.75 + 75 + 12.5}{4}$$

$$= 36\%$$

**Step 9:** Tell participants that they can also see % Medicines Availability (both at a facility and National level) on the mSupply Dashboard; you don't have to manually calculate it yourself every time. Conclude by appreciating all participants.

## Session 3.11: Basis Reports – Expiring Items

### Objectives:

By the end of this session, the participants should be able to:

1. Explain expiring items reports
2. Demonstrate the ability to develop expiring items reports

Total Time: 25 minutes

S/N	Activity	Learning Methods	Time Allocated
1.	Brief Introduction	Lecture	5 minutes
2.	How to Develop Expiring Items Reports	Interactive lecturette	20 minutes

### 1. Activity 1: Brief Introduction – 5 minutes

**Step 1:** Explain that the expiring items report produces a list of items that will expire on or before a specific date. It also lists the quantity and value of stock due to expire in that period.

**Step 2:** Explain further that this report helps you to identify:

- Expired items in your stock that must be removed
- Short-dated stock that may need to be reallocated to high consumption facilities to reduce wastage
- Decide whether you need to resupply facilities that could have a stock shortage or stock out due to expiring items.

### 2. Activity 2: How to Develop Expiring Items Reports – 20 minutes

**Step 1:** Start the session with a brief ice breaker. Now, tell the participants we will be looking at the outline steps below on how to run the Expiring Items report.

1. Select the Expiring Items Report

**Basic Reports - Expiring Items**

**1 Select the Expiring Items Report**

Navigate to the **Reports** tab and click on the **Expiring items** report.



## 2. Enter the Report Details

**Basic Reports - Expiring Items**

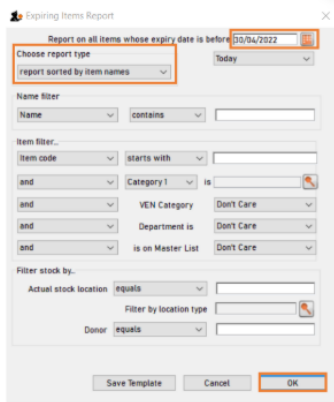
**1 Enter the Report Details**

Enter the **expiry date** - the report will include all items whose expiry date is before this date.

Choose a **report type** from the dropdown menu - you can sort the report by item name, value or expiry date, or include Donor names.

Enter any name or item **filters**, if necessary. You might want to limit the report to Critical Items, items in a particular location, or items from a certain Donor, for example.

Click **OK**.



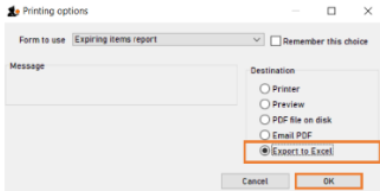
## 3. Select Printing Options

**Basic Reports - Expiring Items**

**1 Select Printing Options**

Select **Export to Excel**, to open the report as a spreadsheet.

Click **OK**.





**Step 2:** Let's take a look at some of the information it contains in an Excel spreadsheet.

**Basic Reports - Expiring Items**

**Title**  
The title of the report includes report type and the store name.

Expiring Items - sorted by item name, for store(s) National Medical Warehouse

Item code	Item	Supplier code	Value	Quantity	Pack Size	Exp date	Accumulative value
PM001	ABORTIFONE 100 MG TABLET	5014	24	1	24	28/04/2023	24
PM002	ABORTIFONE 100 MG TABLET	480234	24	1	24	28/04/2023	48
PM003	AMOXICILLIN 500 MG CAPSULE	5000	84	14	60	31/03/2023	132
PM004	AMOXICILLIN 500 MG CAPSULE	5000	48	480	1	31/03/2023	176
PM005	AMOXICILLIN 500 MG CAPSULE	5001	8	160	1	31/03/2023	176
PM006	AMOXICILLIN 500 MG CAPSULE	50012	2475	4750	1	31/03/2023	3641
PM007	AMOXICILLIN 500 MG CAPSULE	5001	108	408	1	28/02/2023	3849
PM008	CAPTIVOL 10 MG TABLET	5001	105	405	1	28/02/2023	3954
PM009	CAPTIVOL 10 MG TABLET	5001	5	1	5	28/02/2023	3959
PM010	CPTROXALONE 500 MG TABLET (CPTROX)	5001	3600	3600	1	28/02/2023	4015
PM011	CPTROXALONE 500 MG TABLET	48049	3614	1	1	31/03/2023	4016
PM012	IBUKALONE 1 MG TABLET	5001	3000	3000	1	31/03/2023	4316
PM013	IBUPROFEN 200 MG TABLET	5000	84	4080	1	31/03/2023	4399
PM014	METFORMIN 500 MG TABLET	480234	3070	3070	1	28/02/2023	4706
PM015	METFORMIN 500 MG TABLET	5000	1100	1100	1	28/02/2023	5806
PM016	METFORMIN 500 MG TABLET	5000	300	3000	1	28/02/2023	6106
PM017	METFORMIN 500 MG TABLET	480234	4000	4000	1	28/02/2023	10106
PM018	METFORMIN 500 MG TABLET	5000	400	4000	1	28/02/2023	10506
PM019	PARACETAMOL 500 MG TABLET	5001	2000	4000	1	31/03/2023	10906
PM020	PARACETAMOL 500 MG TABLET	5001	71.12	40	1	28/02/2023	10977

**Basic Reports - Expiring Items**

**Quantity**  
This shows the number of packs expiring by the specified date.

Expiring Items - sorted by item name, for store(s) National Medical Warehouse

Item code	Item	Supplier code	Quantity	Pack Size	Exp date	Accumulative value	
PM001	ABORTIFONE 100 MG TABLET	5014	24	1	28	28/04/2023	24
PM002	ABORTIFONE 100 MG TABLET	480234	24	1	24	28/04/2023	48
PM003	AMOXICILLIN 500 MG CAPSULE	5000	48	14	60	31/03/2023	132
PM004	AMOXICILLIN 500 MG CAPSULE	5000	480	480	1	31/03/2023	176
PM005	AMOXICILLIN 500 MG CAPSULE	5001	8	160	1	31/03/2023	176
PM006	AMOXICILLIN 500 MG CAPSULE	50012	2475	4750	1	31/03/2023	3641
PM007	AMOXICILLIN 500 MG CAPSULE	5001	108	408	1	28/02/2023	3849
PM008	CAPTIVOL 10 MG TABLET	5001	105	405	1	28/02/2023	3954
PM009	CPTROXALONE 500 MG TABLET (CPTROX)	5001	3600	3600	1	28/02/2023	4015
PM010	CPTROXALONE 500 MG TABLET	48049	3614	1	1	31/03/2023	4016
PM011	IBUKALONE 1 MG TABLET	5001	3000	3000	1	31/03/2023	4316
PM012	IBUPROFEN 200 MG TABLET	5000	84	4080	1	31/03/2023	4399
PM013	METFORMIN 500 MG TABLET	480234	3070	3070	1	28/02/2023	4706
PM014	METFORMIN 500 MG TABLET	5000	1100	1100	1	28/02/2023	5806
PM015	METFORMIN 500 MG TABLET	5000	300	3000	1	28/02/2023	6106
PM016	METFORMIN 500 MG TABLET	480234	4000	4000	1	28/02/2023	10106
PM017	METFORMIN 500 MG TABLET	5000	400	4000	1	28/02/2023	10506
PM018	PARACETAMOL 500 MG TABLET	5001	2000	4000	1	31/03/2023	10906
PM019	PARACETAMOL 500 MG TABLET	5001	71.12	40	1	28/02/2023	10977


**Basic Reports - Expiring Items**

**Accumulative value**  
This final cell shows the total value (\$) of all stock expiring by the specified date.

Expiring Items - sorted by item name, for store(s) National Medical Warehouse

Item code	Item	Supplier code	Value	Quantity	Pack Size	Exp date	Accumulative value
PM001	ABORTIFONE 100 MG TABLET	5014	24	1	24	28/04/2023	24
PM002	ABORTIFONE 100 MG TABLET	480234	24	1	24	28/04/2023	48
PM003	AMOXICILLIN 500 MG CAPSULE	5000	84	14	60	31/03/2023	132
PM004	AMOXICILLIN 500 MG CAPSULE	5000	48	480	1	31/03/2023	176
PM005	AMOXICILLIN 500 MG CAPSULE	5001	8	160	1	31/03/2023	176
PM006	AMOXICILLIN 500 MG CAPSULE	50012	2475	4750	1	31/03/2023	3641
PM007	AMOXICILLIN 500 MG CAPSULE	5001	108	408	1	28/02/2023	3849
PM008	CAPTIVOL 10 MG TABLET	5001	105	405	1	28/02/2023	3954
PM009	CPTROXALONE 500 MG TABLET (CPTROX)	5001	3600	3600	1	28/02/2023	4015
PM010	CPTROXALONE 500 MG TABLET	48049	3614	1	1	31/03/2023	4016
PM011	IBUKALONE 1 MG TABLET	5001	3000	3000	1	31/03/2023	4316
PM012	IBUPROFEN 200 MG TABLET	5000	84	4080	1	31/03/2023	4399
PM013	METFORMIN 500 MG TABLET	480234	3070	3070	1	28/02/2023	4706
PM014	METFORMIN 500 MG TABLET	5000	1100	1100	1	28/02/2023	5806
PM015	METFORMIN 500 MG TABLET	5000	300	3000	1	28/02/2023	6106
PM016	METFORMIN 500 MG TABLET	480234	4000	4000	1	28/02/2023	10106
PM017	METFORMIN 500 MG TABLET	5000	400	4000	1	28/02/2023	10506
PM018	PARACETAMOL 500 MG TABLET	5001	2000	4000	1	31/03/2023	10906
PM019	PARACETAMOL 500 MG TABLET	5001	71.12	40	1	28/02/2023	10977

**Summary**  
Great work! You have learnt how to produce an Expiring Items Report for your store.



**Step 3:** Let's look at the report.

## EXPIRING ITEMS REPORT

	A	B	C	D	E	F	G	H
1	Expiring items - sorted by item name, for store(s) National Medical Warehouse							
2	Item code	Item	Supplier code	Value	Quantity	Pack size	Exp date	Accumulative value
3	amo500t	Amoxicillin 500mg tablet	MON	50	50	1	21/04/2023	50
4	amo500t	Amoxicillin 500mg tablet	ARC	480	4	100	28/02/2023	530
5	amo500t	Amoxicillin 500mg tablet	MON	470	470	1	31/01/2023	1000
6	amo500t	Amoxicillin 500mg tablet	ARC	120	1	100	28/02/2023	1120
7	ibu200t	Ibuprofen 200mg tab	ARC	20	2	100	31/03/2023	1140
8	met500t	Metformin 500mg tab	ARC	300	50	1	31/01/2023	1440

**Step 4:** Conclude by informing the participants that we to minimise stock loss and need to dispose of expired stock.

## Session 3.12: Basis Report – Requisition

### Objectives:

By the end of this session, the participants should be able to:

1. Explain requisition report
2. Demonstrate the ability to develop requisition reports

Total Time: 45 minutes

S/N	Activity	Learning Methods	Time Allocated
1.	How to Develop Requisition Reports	Interactive lecturette	45 minutes

### Activity: How to Develop Requisition Reports – 45 minutes

**Step 1:** Begin by welcoming the participants to this session. Let's look at it step by step in generating a requisition report.

1. Introduction



## 2. Report Type

### Reports - Requisitions

#### Report type

You can report on requisitions in 2 ways:

- **Grouped by item**, showing which customers the item was requested by, what has been sent and what is outstanding, or
- **Grouped by customer**, showing which items a customer has requested, what has been sent and what is outstanding.

*Note: Grouped by item and Grouped by Item (Pivot table/Excel friendly) reports have the same contents, they are just formatted slightly differently.*

Requisition Report options

Report type: Grouped By Item

Requisition filter: Grouped By Customer

Entry is from: 1/07/2021 To: 30/07/2021 This month

Include requisitions with these statuses: ☒ Suggested (sg) ☒ Confirmed (cn) ☐ Finalised (fn)

☐ Include lines that have been fully supplied

Item filter...

Item code starts with

and Category 1 is

and VEN Category Don't Care

and Department is Don't Care

and is on Master List Don't Care

Requisition customer filter

Name contains

and Category 1 is

and Category 1 is

and Customer group is Don't Care

Cancel OK

## 3. Requisition Filter

### Reports - Requisitions

#### Requisition filter

The **Requisition filter** settings enable you to select which requisitions you want to include in the reports, based on their entry date (this month so far is set by default) or status.

Leave the **Include lines that have been fully supplied** checkbox unchecked to show outstanding requisition lines only (i.e. items and quantities still to be supplied).

Requisition Report options

Report type: Grouped By Item

Requisition filter: Grouped By Item

Entry is from: 1/07/2021 To: 30/07/2021 This month

Include requisitions with these statuses: ☒ Suggested (sg) ☒ Confirmed (cn) ☐ Finalised (fn)

☐ Include lines that have been fully supplied

Item filter...

Item code starts with

and Category 1 is

and VEN Category Don't Care

and Department is Don't Care

and is on Master List Don't Care

Requisition customer filter

Name contains

and Category 1 is

and Category 1 is

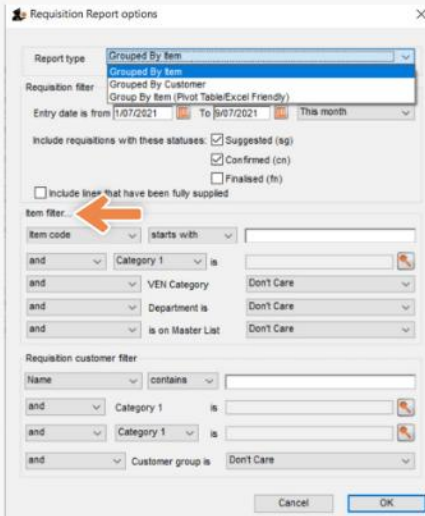
and Customer group is Don't Care

Cancel OK

#### 4. Item filter

### Item filter

The **Item filter** section allows you to select which items will appear in the report (only requisition lines for items matching these filters will be included in the report). If you don't set any of these, there will be no filtering by item.

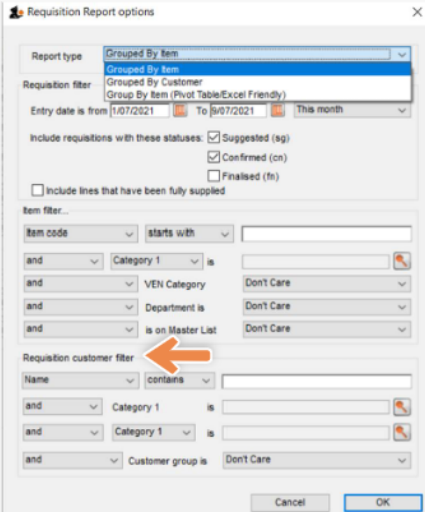


The screenshot shows the 'Requisition Report options' dialog box. The 'Report type' is set to 'Grouped By Item'. The 'Requisition filter' is set to 'Grouped By Customer'. The 'Entry date is from' is 1/07/2021 and 'To' is 30/07/2021. The 'Include requisitions with these statuses' are checked for 'Suggested (sg)', 'Confirmed (cn)', and 'Finalised (fn)'. The 'Item filter...' section is highlighted with an orange arrow. It contains fields for 'Item code', 'starts with', and a series of filters: 'Category 1', 'VEN Category', 'Department', and 'is on Master List', all set to 'Don't Care'.

#### 5. Customer Requisition filter

### Requisition customer filter

Finally, the **Requisition customer filter** section allows you to select the customers whose requisitions will be included in the report. If you don't set anything in this section, requisitions for all customers will be included in the report.



The screenshot shows the 'Requisition Report options' dialog box. The 'Report type' is set to 'Grouped By Item'. The 'Requisition filter' is set to 'Grouped By Customer'. The 'Entry date is from' is 1/07/2021 and 'To' is 30/07/2021. The 'Include requisitions with these statuses' are checked for 'Suggested (sg)', 'Confirmed (cn)', and 'Finalised (fn)'. The 'Item filter...' section is highlighted with an orange arrow. The 'Requisition customer filter' section is highlighted with an orange arrow. It contains fields for 'Name', 'contains', and a series of filters: 'Category 1', 'Category 1', and 'Customer group', all set to 'Don't Care'.

6. Click ok

**Reports - Requisitions**

**Click OK**

When you are happy with your Report type and filters, click OK.

**Requisition Report options**

Report type: **Grouped By Item**

Requisition filter: **Grouped By Customer**

Entry date is from: **1/07/2021** To: **30/07/2021** This month

Include requisitions with these statuses: ☒ Suggested (sg) ☒ Confirmed (cn) ☐ Finalised (fn)

☐ Include lines that have been fully supplied

Item filter...

Item code starts with

and Category 1 is

and VEN Category is Don't Care

and Department is Don't Care

and is on Master List Don't Care

Requisition customer filter

Name contains

and Category 1 is

and Category 1 is

and Customer group is Don't Care

Cancel OK

7. Select Export to Excel, then click ok

Select **Export to Excel**, then click **OK**.

**Printing options**

Form to use: **requisition grouped by item** ☐ Remember this choice

Message

Destination

☐ Printer

☐ Preview

☐ PDF file on disk

☐ Email PDF

☒ **Export to Excel**

Cancel OK

Your report will open as an Excel spreadsheet.

Let's take a look at some of the information it contains.

**Step 2:** Tell the participants how wonderful they have been since the beginning of this Level. Below is are Excel report generated

**Item name**  
This column tells you the name of the item listed in the requisition

**Our stock on hand**  
This column tells you your stock on hand for each item

**Customer name**  
This column tells you the name of the customer who placed the requisition

**Requisition Date**  
This column tells you the date the requisition was placed

**Their stock on hand**  
This column tells you how much stock they have in their store

**Quantity Requested**  
This column tells you the quantity of stock the customer has requested

**Quantity already issued**  
This column tells you the quantity of stock already issued. For example, you may have only supplied a partial quantity because you may not have had enough stock yourself.

**To be Supplied**  
This column tells you the remaining quantity to be supplied of each item to each customer

**Total**  
Each item has a Total row, which calculates how much of that item customer(s) have on hand, how much they have requested and how much is remaining to be supplied.

**Step 3:** Conclude the session by appreciating everyone for their time and contributions.

# LEGACY LEVEL 4



## Session 4.1: Suggested Order Quantity Report and Manual Quantification

### Objectives:

By the end of this session, the participants should be able to:

1. Explain how suggested order quantities are calculated
2. Describe the process of clean up
3. Demonstrate ability to generate report
4. Apply manual quantification

Time: 50 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	How suggested order quantities are calculated by mSupply	Lecturette/ group demonstration	10 minutes
2.	Clean up mSupply	Lecturette/ group demonstration	10 minutes
3.	Generating the suggested order Quantity Report	Lecturette/ group demonstration	20 minutes
4.	Manual Quantification	Lecturette/ group demonstration	10 minutes

### Activity 1: How suggested order quantities are calculated by mSupply

**Step 1:** Welcome participants to this course and assure them that it will an interest course but they will need to be attentive, concentrate, participate full and avoid any distractions.

**Step 2:** inform participants that we will looking at 3 distinct steps required to arrived at suggested order quantities for each line stock. An they are


1. Forecast future consumption
2. Calculated required stock quantity
3. Calculated purchase order quantity

**Step 3:** ask participants if they have any question, if no questions move the next task which is explaining the steps using the slides below.



## 1. Forecast future consumption

How suggested order quantities are calculated by mSupply



### Forecast future consumption


mSupply assumes future consumption will match previous consumption rates (unless you make changes to forecasting – this is beyond the scope of this unit; please contact mSupply Support if you wish to learn more).

**Note:** In certain situations you may want to provide your own forecasts. Reasons for this could include factors such as:

- Excessive, sudden population increase
- An epidemic causing increased demand
- Historical usage being inaccurate due to operator error or out of stocks.
- A change to Standard Treatment Guidelines meaning a new treatment is being introduced, and there is no historical data
- Morbidity and mortality data has been obtained and used to calculate requirements.

## 2. Calculate required stock quantity

How suggested order quantities are calculated by mSupply



### Calculate required stock quantity

The amount of stock you **require** is based on the forecast of future consumption, modified by a range of factors including:

The **Lead time**: The time delay between carrying out the quantification analysis and when the stock is delivered to the store

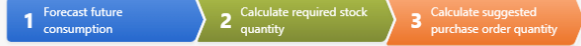
The **Ordering cycle**: How often you plan to order this item

The **Buffer stock**: How much of this item you plan to have on hand just before your next order arrives.

All of these are measured in months.

## 3. Calculate suggested purchase order quantity

How suggested order quantities are calculated by mSupply



### Calculate suggested purchase order quantity

Purchase Order quantities are based on the amount of stock required, normally expressed as a number of months of AMC, modified by factors including:

- The **current stock level** (note: stock with no expiry date is counted as current stock for this calculation!).
- The **amount of stock on backorder** to customers (if you are running the backorder feature).
- The **amount of stock already on order** from Suppliers, but that has not yet arrived in your store.

**Purchase order quantity = stock required - current stock level + stock on backorder to customers - stock on order from suppliers**

## Activity 2: Clean up mSupply

**Stem 1:** Tell participants that before generating the suggested order quantity report it's important to clean up mSupply generating this report to ensure it is as accurate as possible. Below are things to check. Let's look at step by step process.

1. Delete or Finalise Ghost Purchase Orders.

1

**Delete or Finalise Ghost Purchase Orders**

Ghost Purchase Orders are Purchase Orders that will never arrive (for example they may have been entered in error, or the order was placed but later cancelled).

2

If ghost purchase orders are left in the system in **cn** status, mSupply will still think that these items are still arriving and this will affect the suggested order quantity.

3

Order no	Status	Date	Supplier	Locked	Target months	Lines	Confirm date	Comment
12	sg	8/03/2022	Asul Medica	<input type="checkbox"/>	0	1		
11	fn	18/02/2022	Budget Pharmacy Pji	<input type="checkbox"/>	0	1	18/02/2022	PO generated for tender number: 18 No of...
9	sg	4/02/2022		<input type="checkbox"/>	12	1		
6	cn	11/01/2022	Asul Medica	<input type="checkbox"/>	0	1	11/01/2022	
6	cn	6/01/2022	Asul Medica	<input type="checkbox"/>	0	1	6/01/2022	
6	fn	5/01/2022	Archie Distribution	<input type="checkbox"/>	0	2	5/01/2022	
12	sg	9/11/2021	Asul Medica	<input type="checkbox"/>	0	1		PO generated for tender number: 25 No of...
3	sg	9/11/2021	Archie Distribution	<input type="checkbox"/>	0	3		PO generated for tender number: 25 No of...

**2. Confirm outstanding Customer and Supplier Invoice****Confirm outstanding Customer and Supplier Invoices**

Confirmed Customer Invoices will count towards usage, and confirmed Supplier Invoices will count towards current stock on hand.

Name	Type	Status	Entered	Confirmed	Invalue	Total	Their ref	Picksl	Comment	Exported batch
Thornbury Wareha...	ci	sg	3/06/2022		27	2000				0
Thornbury Wareha...	ci	fn	10/02/2022	10/02/2022	26	0	From requ...		Invoice from requisition 15; From request re...	0
Thornbury Wareha...	ci	fn	10/02/2022	10/02/2022	25	0	From requ...		Invoice from requisition 15; From request re...	0
Thornbury Wareha...	ci	cn	9/02/2022	9/02/2022	24	1000				0
Thornbury Wareha...	ci	fn	1/02/2022	1/02/2022	23	50				0
Thornbury Wareha...	ci	fn	24/01/2022	24/01/2022	22	250	From requ...		Invoice from requisition 10; From request re...	0
Laboratory	ci	cn	11/01/2022	11/01/2022	21	5000			Supplier invoice ID : 28 Goods receive ID : 9	0

**3. Tidy items List****Tidy items list**

Add any new items to mSupply.

Where items will no longer be ordered e.g. if they've been removed from the Essential Medicines List, ensure that this is marked in mSupply so it doesn't appear on the suggested order quantity report (when the correct filter is applied).

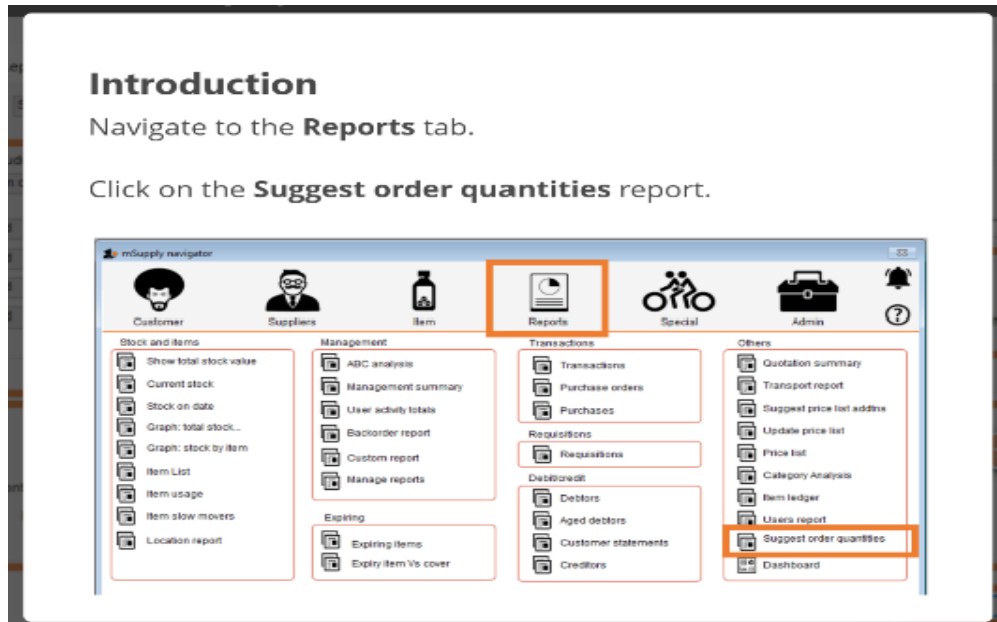
How you filter the items to be included on the report is up to you. One method of doing this is identifying all items to be ordered as **Normal** stock (both medicines and consumables).

Item name	Item code	Units	Department	Category	Category 2	Category 3	Interaction group	Item flag	Pricing	Full description	VEN Category	Stock category
Amoxicillin 500mg tablet	amox500t	Tab	Restricted antibiotics		None	None	None	Antibiotic				Normal stock <input checked="" type="checkbox"/>

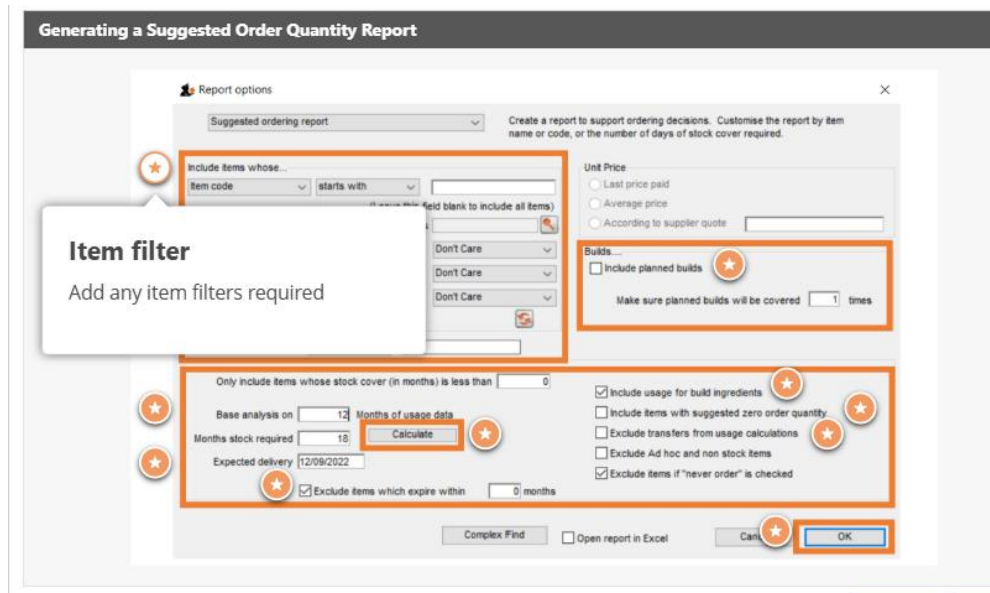
## Activity 3: Generating the suggested order Quantity Report

**Step 1:** Lets look at the step by step of how to create the report itself using the slides below.

### 1. Introduction



### 2. Item Filter



### 3. Base analysis on \_months of usage data

**Generating a Suggested Order Quantity Report**

Report options

Suggested ordering report

Create a report to support ordering decisions. Customise the report by item name or code, or the number of days of stock cover required.

Unit Price

☐ Last price paid

☐ Average price

☐ According to supplier quote

Builds

☐ Include planned builds

Make sure planned builds will be covered  times

Only include items whose stock cover (in months) is less than

Base analysis on  Months of usage data

Months stock required  **Calculate**

Expected delivery 12/09/2022

☒ Exclude items which expire within  months

☒ Include usage for build ingredients

☐ Include items with suggested zero order quantity

☐ Exclude transfers from usage calculations

☐ Exclude Ad hoc and non stock items

☒ Exclude items if "never order" is checked

Complex Find ☐ Open report in Excel **Cancel** **OK**

**Base analysis on \_months of usage data**

Enter the number of months of historical usage (consumption) data you want mSupply to use

### 4. Months stock required

**Generating a Suggested Order Quantity Report**

Report options

Suggested ordering report

Create a report to support ordering decisions. Customise the report by item name or code, or the number of days of stock cover required.

Unit Price

☐ Last price paid

☐ Average price

☐ According to supplier quote

Builds

☐ Include planned builds

Make sure planned builds will be covered  times

Only include items whose stock cover (in months) is less than

Base analysis on  Months of usage data

Months stock required  **Calculate**

Expected delivery 12/09/2022

☒ Exclude items which expire within  months

☒ Include usage for build ingredients

☐ Include items with suggested zero order quantity

☐ Exclude transfers from usage calculations

☐ Exclude Ad hoc and non stock items

☒ Exclude items if "never order" is checked

Complex Find ☐ Open report in Excel **Cancel** **OK**

**Months stock required**

This is the months of stock you require to have on hand.

Click the **Calculate** button to enter the **Lead time**, **Ordering cycle** and **buffer stock** to calculate your **total months of stock required**.

## 5. Expected delivery

**Generating a Suggested Order Quantity Report**

Report options

Suggested ordering report

Create a report to support ordering decisions. Customise the report by item name or code, or the number of days of stock cover required.

Include items whose...  
 Item code starts with (Leave this field blank to include all items)

Unit Price  
☐ Last price paid  
☐ Average price  
☐ According to supplier quote

Builds...  
☐ Include planned builds  
 Make sure planned builds will be covered 1 times

Months stock required 10  
 Expected delivery 12/09/2022  
☒ Exclude items which expire within 0 months

☒ Include usage for build ingredients  
☐ Include items with suggested zero order quantity  
☐ Exclude transfers from usage calculations  
☐ Exclude Ad hoc and non stock items  
☒ Exclude items if "never order" is checked

Complex Find Open report in Excel Cancel OK

**Expected delivery**  
 The expected delivery date is automatically calculated from your lead time

## 6. Include usage for build ingredients

**Generating a Suggested Order Quantity Report**

Report options

Suggested ordering report

Create a report to support ordering decisions. Customise the report by item name or code, or the number of days of stock cover required.

Include items whose...  
 Item code starts with (Leave this field blank to include all items)

Unit Price  
☐ Last price paid  
☐ Average price  
☐ According to supplier quote

Builds...  
☐ Include planned builds  
 Make sure planned builds will be covered 1 times

Months stock required 10  
 Expected delivery 12/09/2022  
☒ Exclude items which expire within 0 months

☒ Include usage for build ingredients  
☐ Include items with suggested zero order quantity  
☐ Exclude transfers from usage calculations  
☐ Exclude Ad hoc and non stock items  
☒ Exclude items if "never order" is checked

Complex Find Open report in Excel Cancel OK

**Include usage for build ingredients**  
 Checking this box ensures any items that were used in builds (manufactured items) will be taken into account when calculating historic consumption

## 7. Include items with suggested zero order quantity

**Generating a Suggested Order Quantity Report**

Report options

Suggested ordering report

Create a report to support ordering decisions. Customise the report by item name or code, or the number of days of stock cover required.

Include items whose...  
 Item code starts with (Leave this field blank to include all items)

Unit Price  
☐ Last price paid  
☐ Average price  
☐ According to supplier quote

Builds...  
☐ Include planned builds  
 Make sure planned builds will be covered 1 times

Months stock required 10  
 Expected delivery 12/09/2022  
☒ Exclude items which expire within 0 months

☐ Include usage for build ingredients  
☐ Include items with suggested zero order quantity  
☐ Exclude transfers from usage calculations  
☐ Exclude Ad hoc and non stock items  
☒ Exclude items if "never order" is checked

Complex Find Open report in Excel Cancel OK

**Include items with suggested zero order quantity**  
 Checking this box ensures any items which don't need to be ordered are also included in your report. They

## 8. Exclude transfers from usage calculations

**Generating a Suggested Order Quantity Report**

**Report options**

Suggested ordering report

Create a report to support ordering decisions. Customise the report by item name or code, or the number of days of stock cover required.

Include items whose...  
 Item code starts with (Leave this field blank to include all items)  
 and Category 1 is  
 and VEN Category Don't Care  
 and Department is Don't Care  
 and is on Master List Don't Care  
 No. of items with these criteria: 0  
 and donor equals

Only include items whose stock cover (in months) is less than 0

Base analysis on 12 Months of usage data  
 Months stock required 18 Calculate  
 Expected delivery 12/09/2022  
☒ Exclude items which expire within 0 months

Unit Price  
☐ Last price paid  
☐ Average price  
☐ According to supplier quote

Builds...  
☐ Include planned builds  
 Make sure planned builds will be covered 1 times

☒ Include usage for build ingredients  
☐ Include items with suggested zero order quantity  
☐ Exclude transfers from usage calculations  
☐ Exclude Ad hoc and non stock items  
☒ Exclude items if "never order" is checked

Complex Find ☐ Open report in Excel

**Exclude transfers from usage calculations**  
 If you are running this report for a single store, ensure this checkbox is NOT ticked.

## 9. Exclude items which expire within months

**Generating a Suggested Order Quantity Report**

**Report options**

Suggested ordering report

Create a report to support ordering decisions. Customise the report by item name or code, or the number of days of stock cover required.

Include items whose...  
 Item code starts with (Leave this field blank to include all items)  
 and Category 1 is  
 and VEN Category Don't Care  
 and Department is Don't Care  
 and is on Master List Don't Care  
 No. of items with these criteria: 0  
 and donor equals

Only include items whose stock cover (in months) is less than 0

Base analysis on 12 Months of usage data  
 Months stock required 18 Calculate  
 Expected delivery 12/09/2022  
☒ Exclude items which expire within 0 months

Unit Price  
☐ Last price paid  
☐ Average price  
☐ According to supplier quote

Builds...  
☐ Include planned builds  
 Make sure planned builds will be covered 1 times

☒ Include usage for build ingredients  
☐ Include items with suggested zero order quantity  
☐ Exclude transfers from usage calculations  
☐ Exclude Ad hoc and non stock items  
☒ Exclude items if "never order" is checked

Complex Find ☐ Open report in Excel

**Exclude items which expire within \_ months**  
 If this box is checked, the calculation will ignore any stock on hand with an expiry within the number of months you've chosen.

## 10. Include planned builds

**Generating a Suggested Order Quantity Report**

Report options

Suggested ordering report

Create a report to support ordering decisions. Customise the report by item name or code, or the number of days of stock cover required.

Include items whose...

Item code starts with (Leave this field blank to include all items)

and Category 1 is

and VEN Category Don't Care

and Department is Don't Care

and is on Master List Don't Care

No. of items with these criteria: 0

and donor equals

Only include items whose stock cover (in months) is less than

Base analysis on 12 Months of usage data

Months stock required 18 Calculate

Expected delivery 12/09/2022

☒ Exclude items which expire within 0 months

Unit Price

☐ Last price paid

☐ Average price

☐ According to supplier quote

Builds...

☐ Include planned builds

Make sure planned builds will be covered 1 times

**Include planned builds**

If you have builds with placeholder lines (reflecting a planned manufacturing schedule), the proposed order quantity for each item will be adjusted by the amount

## 11. Click ok

**Generating a Suggested Order Quantity Report**

Report options

Suggested ordering report

Create a report to support ordering decisions. Customise the report by item name or code, or the number of days of stock cover required.

Include items whose...

Item code starts with (Leave this field blank to include all items)

and Category 1 is

and VEN Category Don't Care

and Department is Don't Care

and is on Master List Don't Care

No. of items with these criteria: 0

and donor equals

Only include items whose stock cover (in months) is less than

Base analysis on 12 Months of usage data

Months stock required 18 Calculate

Expected delivery 12/09/2022

☒ Exclude items which expire within 0 months

Unit Price

☐ Last price paid

☐ Average price

☐ According to supplier quote

Builds...

☐ Include planned builds

Make sure planned builds will be covered 1 times

**Click OK**

When you are finished, click OK.

Complex Find ☐ Open report in Excel

**Step 2:** Participants can also watch the slide video for better understanding. They can you the link below.

[https://learn.msupply.foundation/pluginfile.php/1283/mod\\_scorm/content/1/res/data/video1.mp4](https://learn.msupply.foundation/pluginfile.php/1283/mod_scorm/content/1/res/data/video1.mp4)



## Step 3: let look at suggested ordering report exported to excel step by step

**Suggested Ordering Report**

**Suggested Ordering Report: Months cover: 15 months. Based on last 6 months usage data.**

**Report Title**  
This is the title of your report, including parameters used to help calculate the desired quantity.

Item Code	Item Name	VEN	category	Stock on hand	Quantity on Order	Ordered quantity in use	Suggested order	Forecast
iso100	Isoniazid 100mg			0	0	0	6492.9	
iso300	Isoniazid 300mg			0	0	0	210	

**Suggested Ordering Report**

**Item Code and Item Name**  
These are the Items that mSupply thinks you should order based on the parameters you input.

Item Code	Item Name	VEN	category	Stock on hand	Quantity on Order	Ordered quantity in use	Suggested order	Forecast
iso100	Isoniazid 100mg			0	0	0	6492.9	
iso300	Isoniazid 300mg			0	0	0	210	

**Suggested Ordering Report**

**Stock on hand**  
This is your current Stock on hand.  
Note that this is excluding any stock that would expire in the next two months (that was a parameter entered when generating this report). In actual fact, this store still has 200 x isoniazid 300mg tablets but they all expire within 2 months.

Item Code	Item Name	VEN	category	Stock on hand	Quantity on Order	Ordered quantity in use	Suggested order	Forecast
iso100	Isoniazid 100mg			0	0	0	6492.9	
iso300	Isoniazid 300mg			0	0	0	210	

**Suggested Ordering Report**

**Back order**  
This is the amount of stock owing to customers (if you use this function).

Item Code	Item Name	VEN	category	Stock on hand	Back order	Quantity on Order	Ordered quantity in use	Suggested order	Forecast
iso100	Isoniazid 100mg			0	0	0	6492.9		
iso300	Isoniazid 300mg			0	0	0	210		

**Suggested Ordering Report**

**Months average usage**  
This is your 12 months, 24 months and 6 months average usage, respectively.  
As you can see, the 24 months average is exactly half the 12 months average - this is because this store is only one year old so there is no usage data before then!  
Note that mSupply rounds these figures to whole numbers (which explains why the math is a bit tricky to work out sometimes!)

Item Code	Item Name	VEN	category	Stock on hand	Back order	12 months average	24 months average	6 months average	Months cover
iso100	Isoniazid 100mg			0	0	200	100	200	15
iso300	Isoniazid 300mg			0	0	0	0	0	0

**Suggested Ordering Report**

**Months Cover**  
This is how many months cover you have based on your stock on hand.  
**Note:** this may include expiring stock and should be considered during quantification.

Item Code	Item Name	VEN	category	Stock on hand	Back order	Quantity on Order	Ordered quantity in use	Suggested order	Forecast
iso100	Isoniazid 100mg			0	0	0	6492.9		
iso300	Isoniazid 300mg			0	0	0	210		

**Suggested Ordering Report**

**Quantity on Order**  
This is the amount of these items which already exist on a purchase order (and which have not yet arrived).

Item Code	Item Name	VEN	category	Stock on hand	Back order	Quantity on Order	Ordered quantity in use	Suggested order	Forecast
iso100	Isoniazid 100mg			0	0	0	6492.9		
iso300	Isoniazid 300mg			0	0	0	210		

**Suggested Ordering Report**

**Ordered quantity in use**  
This is the quantity on order that will be used during the upcoming ordering cycle

Item Code	Item Name	VEN	category	Stock on hand	Back order	Quantity on Order	Ordered quantity in use	Suggested order	Forecast
iso100	Isoniazid 100mg			0	0	0	6492.9		
iso300	Isoniazid 300mg			0	0	0	210		

**Suggested Ordering Report**

**Suggested order**  
This is the final amount mSupply recommends you order after taking all the other factors into account.

Item Code	Item Name	VEN	category	Stock on hand	Back order	12 months average	24 months average	6 months average	Months cover	Suggested order	Forecast
iso100	Isoniazid 100mg			0	0	200	100	200	15	6492.9	
iso300	Isoniazid 300mg			0	0	0	0	0	0	210	

**Suggested Ordering Report**

**Forecast used**  
This column indicates whether you are using the default forecast method (assuming future consumption will match historical consumption). This is indicated by N.  
If you have selected an alternative method, this column will display Y.

Item Code	Item Name	VEN	category	Stock on hand	Back order	12 months average	24 months average	6 months average	Months cover	Suggested order	Forecast
iso100	Isoniazid 100mg			0	0	200	100	200	15	6492.9	N
iso300	Isoniazid 300mg			0	0	0	0	0	0	210	N

**Step 3:** Tell participants that now they now how to create a Suggested Order Quantity Report and understand how it is calculated. Congratulations.



## Activity 4: Manual Quantification

**Step 1:** We will be looking at how to perform manual Quantification.

### Manual Quantification Methods

#### 1. Time period sub-sets

**Manual Quantification Methods**

**Time period sub-sets**

This method is helpful if you had reliable data for some months but not for the entire previous 12 months.

Find a consecutive series of months where the item was in stock and usage appeared to be normal.

Disregard the first and last months (you often get a spike in usage when stock arrives and you may have run out during the last month so the data is not reflective of normal usage) and calculate the average based on the "middle" months.

#### 2. Local epidemiology

**Local epidemiology**

This method is useful for disease-specific products.

By knowing the incidence or prevalence of a particular disease and by estimating the % of patients who will then need this agent, you can work out how much stock is required. Don't forget to add in some buffer stock!

#### 3. Similar products that are being replaced

**Manual Quantification Methods**

**Time period sub-sets**

**Local epidemiology**

**Similar products that are being replaced**

If this agent is replacing another agent e.g. omeprazole was replacing ranitidine, you can work out the equivalent DDD (Defined Daily Dose) and use this to figure out how much stock is required.

#### 4. Similar countries

**Manual Quantification Methods**

**Similar countries**

If two countries are similar in terms of:

- Demographics (age, gender, ethnicity, basic health characteristics)
- Socioeconomics (same national GDP, same World Bank classification of Lower-Income Country etc)
- Population (similar order of magnitude)
- Health system (public vs private, similar performance)

You can ask one country for their usage for a particular item, and then adjust it to the second country's population.

This can give you a rough idea of your quantification; noting that different countries may have different guidelines, education campaigns and indications for a particular product.

#### 5. Departmental Liaison

**Manual Quantification Methods**

**Time period sub-sets**

**Local epidemiology**

**Similar products that are being replaced**

**Similar countries**

**Departmental liaison**

Speak to the people who will be using a particular product and they should be able to give you a reasonable idea of how many patients may need it and therefore how much to order.

**Step 2:** inform the participants that is a broad overview. Appreciate them.

## Session 4.2: Introduction to the Tender Module

### Objectives:

By the end of this session, the participants should be able to:

1. Explain tender and its important
2. Describe a and demonstrate workflow tender module

Time: 25 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Introduction to Tender	Lecturette	5 minutes
2.	Workflow in Tender Module	Lecturette/ group demonstration	20 minutes

### Activity 1: Introduction to Tender

**Step 1:** The trainer should use the information in the trainers box below to start the session.

#### Trainers Note:

It is common practice in many countries to publish a tender. This is a country to seek the best prices of Medicines and consumables that will be required and achieving the best value for available funds over a period of time.

Normally the full tender process creates a lot of work which can be very time consuming and error-prone. The mSupply Tender Module is designed to simplify this process, minimize the work involved and to reduce the chances of errors.

**Step 2:** ask participants if they have any questions, treat all questions interactively with the larger class.

**Step 3:** Inform participants that some of the benefits of Tender Module can be:

1. Time saving and increased accuracy – Suppliers can enter their own bids into the system. You do not need to consolidate multiple bids and re-enter the information into a busy spreadsheet

2. Cost saving – The Tender Module facilitates easy line by line evaluation of bid. It will adjust prices in different currencies across different packs sizes from multiple bidders so that you don't have to do this manually. There can greater cost savings using this approach than awarding an entire tender to a lower bidder overall.
3. Transparency and data security' – Once the tender is published using the Remote Tender Module, no one else can edit tender. Once the bids have been submitted and the bidding period is closed, no one can edit the suppliers responses

## Activity 2: Workflow in Tender Module

**Step 1:** Lets look at the step by step workflow in Tender Module. Use the slide below.

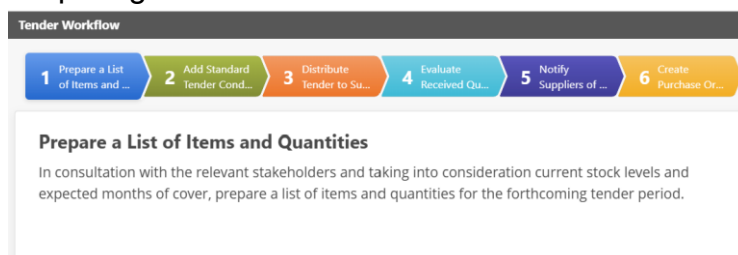
### Introduction

#### Introduction

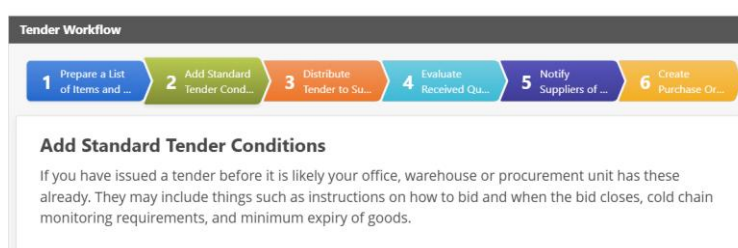
As usual in a tender process, forward planning is necessary and the process must be started several months before the goods will be on site and available for use.

There are a lot of features of the Tender Module that we will go through shortly, but the overall workflow is as follows.

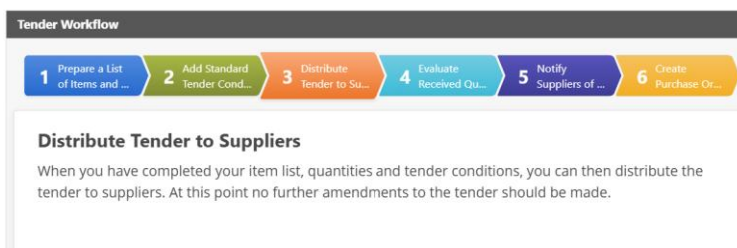
### 1. Preparing a list of Items and Quantities



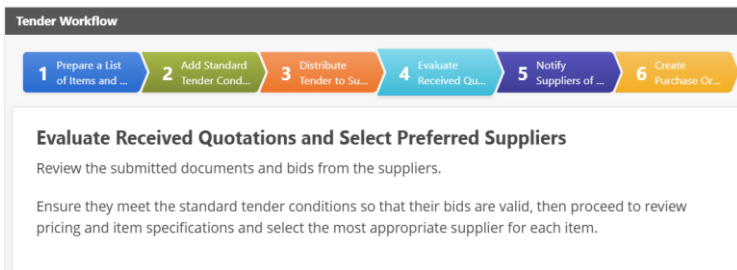
### 2. Add Standard Tender Conditions



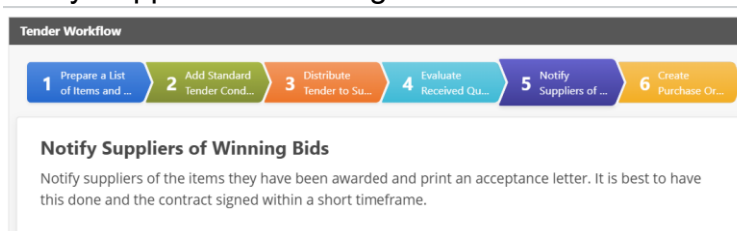
### 3. Distribute Tender to Suppliers



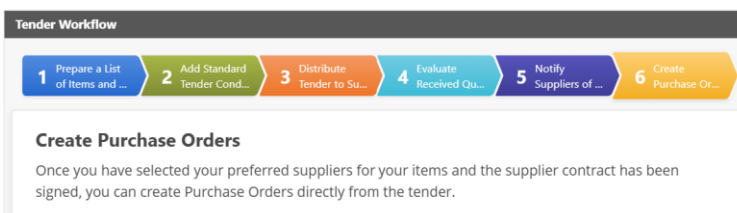
#### 4. Evaluate Received Quotations and Select Preferred Suppliers



#### 5. Notify Suppliers of Winning Bids



#### 6. Create Purchase Orders



**Step 2:** Conclude this session by asking participants if they have any questions.

## Session 4.3: Create a New Manual Tender

### Objectives:

By the end of this session, the participants should be able to:

1. Explain how to create a manual tender
2. Describe the process of new tender
3. Demonstrate the ability to review, edit and delete tender
4. Describe how to upload and reference documents

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Creating a manual tender	Lecturette/ group demonstration	15 minutes
2.	New Tender Window	Lecturette/ group demonstration	15 minutes
3.	Reviewing, editing and deleting tender	Lecturette/ group demonstration	10 minutes
4	Notes and Reference Documents	Lecturette/ group demonstration	15 minutes

### Activity 1: Creating a manual tender

**Step 1:** Inform the participants that there 2 ways to create a new tender using mSupply as stated below.

1. Manually – this method allows you to create the tender by adding each item individually
2. Automatically – once you have been running mSupply for a year and if that year is fairly typicla of your overall usage, mSupply can suggest items and quantities based on actual usage, eliminating any guesswork. The quantities are suggested only and may be amended as required.

**Step 2:** Tell participants that will be looking at the step by step of creating a manual tender.

## 1. Open Tender

[illegible]

## 2. Open New Tender

1

2

## Open New Tender

Click on **New Tender**.

## Activity 2: New Tender Window

**Step 1:** We will be looking at the step by step on how to navigate through the entire tender process. Lets look at each component so we know how it works.

## Components



**Step 2:** Now that participants know what all the fields are for, let's take a look at how to add items to your tender. Please use the slide video link below.

[https://learn.msupply.foundation/pluginfile.php/1280/mod\\_scorm/content/1/res/data/video1.mp4](https://learn.msupply.foundation/pluginfile.php/1280/mod_scorm/content/1/res/data/video1.mp4)

### Activity 3: Reviewing, editing and deleting tender

**Step 1:** Tell participants that in this activity, we will be looking at steps in reviewing, editing and deleting tenders.

#### 1. Viewing Tenders



## Reviewing, editing and deleting tenders

1

### Viewing tenders

Navigate to the **Suppliers** tab and click **Tenders**.



## 2. Open the tender

### Reviewing, editing and deleting tenders

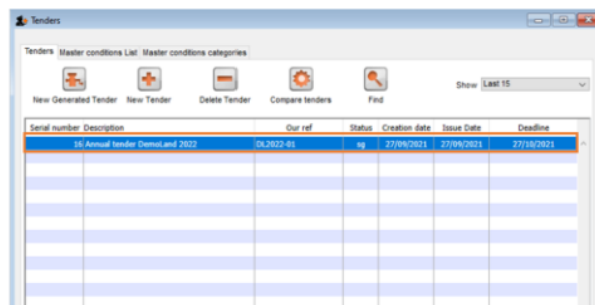
1

### Open the tender

The **Tenders** window will open, showing the **Last 15** tenders by default (if you have them in your system).

To open the tender you wish to view, double click it.

2



### 3. Viewing and editing the tender

1

2

3

4

5

6

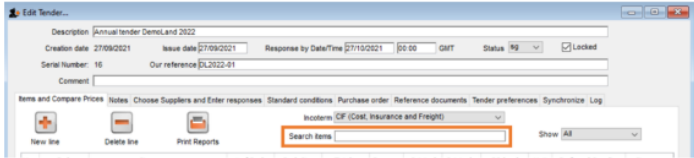
#### Reviewing, editing and deleting tenders

### Viewing and editing the tender

The tender will appear in the **Edit Tender** window. This window contains important information about the items and quantities you've put on your tender. Note that you can adjust the column width of the items displayed and mSupply will remember this each time you view this window.

To view or edit a line, **double click** on the selected item. You can also use the **Search items** field to search for an item.

*In this example, we will edit Ceftriaxone.*



### 4. Edit item

1

2

3

4

5

6

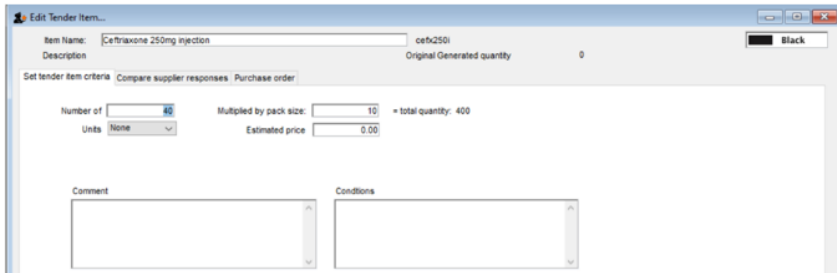
#### Reviewing, editing and deleting tenders

### Edit item

Edit any of the fields you need to.

*In this example, we have changed the number of packs required from 20 to 40.*

After you have made all your necessary edits, click **OK**.



## 5. Viewing the tender

### Reviewing, editing and deleting tenders

1

### Viewing the tender

The tender has been updated with the new quantity.

2

3

4

5

6

The screenshot shows the 'Edit Tender' window for 'Annual tender Demo.Land 2022'. It includes fields for Creation date (27/09/2021), Issue date (27/09/2021), Response by Date/Time (27/10/2021 00:00 GMT), Status (16), and a Locked checkbox. Below these are tabs for 'Items and Compare Prices', 'Notes', 'Choose Suppliers and Enter responses', 'Standard conditions', 'Purchase order', 'Reference documents', 'Tender preferences', 'Synchronize', and 'Log'. The 'Items' tab is active, showing a table with columns: Lin., Code, Item name, # of Packs, Pack Size, Total, Currency, Original, Original, PO local, Unit, Preferred Supplier, and Item. The table contains two items: 'Amoxicillin 500mg tablet' (Lin. 1, Code 1, 100 packs, 500 pack size, Total 50000) and 'Ceftriaxone 250mg injection' (Lin. 2, Code 2, 40 packs, 10 pack size, Total 400).

## 6. Deleting a tender item

### Reviewing, editing and deleting tenders

1

### Deleting a tender item

If you need to delete an item from the tender, select the item and then click **Delete Line**.

When asked to confirm if you want to delete the item, click **Delete**.

Note: ensure the **Locked** checkbox is unchecked or you won't be able to delete anything!

2

3

4

5

6

This screenshot shows the 'Edit Tender' window with the 'Delete Line' button highlighted. A confirmation dialog box titled 'Delete Lines...' is open, asking 'The following lines are to be deleted:' and listing 'Ceftriaxone 250mg injection'.

## 7. View edited tender

### Reviewing, editing and deleting tenders

3

### View edited tender

The item has been removed from the tender.

4

5

6

7

8

The screenshot shows the 'Edit Tender' window after deleting the 'Ceftriaxone 250mg injection' item. The table now only contains the 'Amoxicillin 500mg tablet' item (Lin. 1, Code 1, 100 packs, 500 pack size, Total 50000).

## 8. Deleting an entire tender

3

4

5

6

7

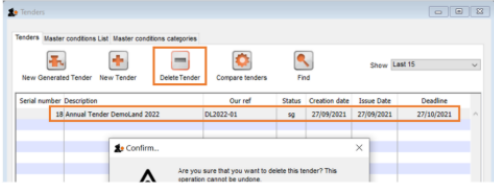
8

### Deleting an entire tender

If you truly need to delete an entire tender, you can do so from the **Tenders** window.

Click on the tender you wish to delete, click **Delete Tender** and **Confirm** when prompted.

Note: Again, this is possible if the **Locked** checkbox is unchecked. Deleting a tender should only be done with great care - you could lose a lot of important work if this is done by accident!

The screenshot shows the 'Tenders' window with a table of tenders. One tender is highlighted. A 'Delete Tender' button is visible in the toolbar. A confirmation dialog box is open, asking 'Are you sure that you want to delete this tender? This operation cannot be undone.'

**Step 2:** Ensure all participants have clear understanding of this activity.

## Activity 4: Notes and Reference Documents

**Step 1:** At this point, inform participants that we are going to learn how to add notes, add reference documents and other relevant steps.

### 1. Add Notes

1

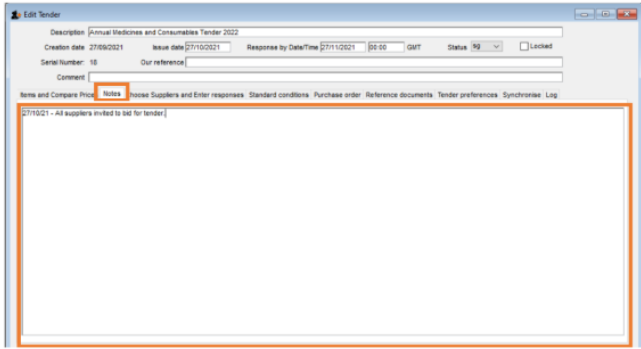
2

3

4

### Adding Notes

Navigate to the **Notes** tab, and enter any notes you wish you to record.

The screenshot shows the 'Edit Tender' window with the 'Notes' tab selected. The 'Notes' tab is highlighted in the toolbar. The main area contains a text box for entering notes. The text '27/10/2021 - All suppliers invited to bid for tender' is visible in the text box.

## 2. Adding Reference Documents

1

2

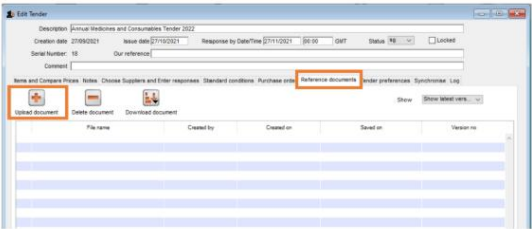
3

4

### Adding Reference Documents

If you wish to add a general reference document, you can do this under the **Reference documents** tab.

Click on **Upload document**, then follow the prompts to upload the file from your computer.



## 3. Viewing or Deleting Documents

1

2

3

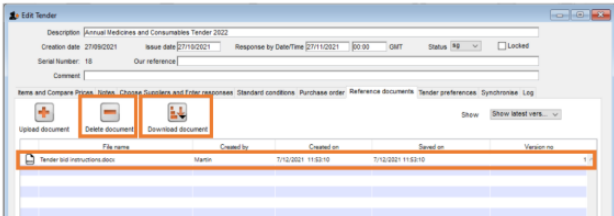
4

### Viewing or Deleting Documents

To view a document, you need to download it.

Select the document to view, and click **Download document** and follow the prompts.

If you need to delete a document, select it and click **Delete document**, and **Confirm** you want to delete it when prompted.



## 4. Filtering Documents

1

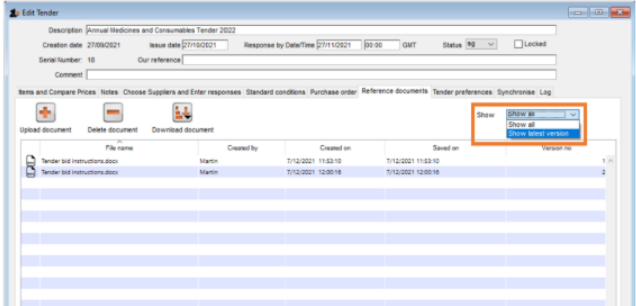
2

3

4

### Filtering Documents

If you have multiple versions of documents, you are able to filter them to **Show latest version** only from the **Show** dropdown menu.



**Step 2:** Now participants should know how to the add notes and upload, view and delete, etc. Close this session by appreciating the participants

## Session 4.4: Create a new Generated Tender

### Objectives:

By the end of this session, the participants should be able to:

1. Explain how to generate auto tender

Time: 15 minutes

### Session Outline/Activity

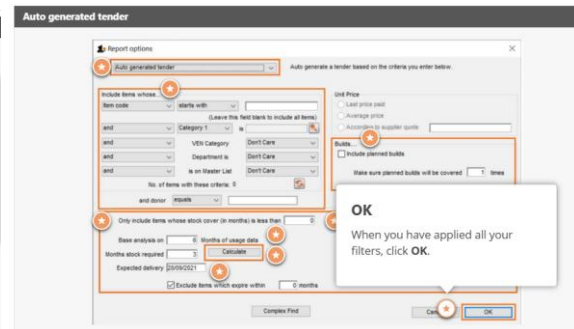
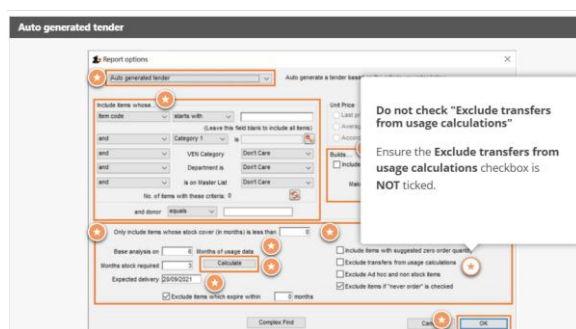
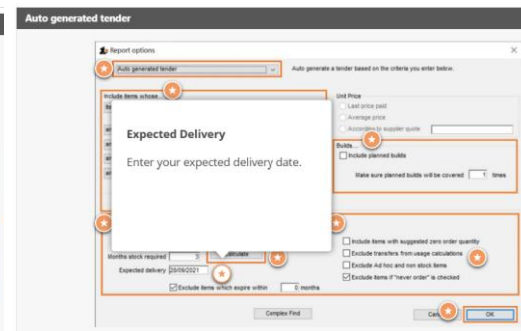
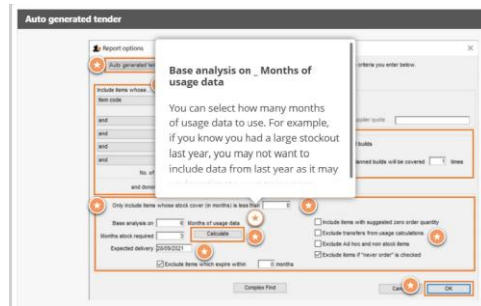
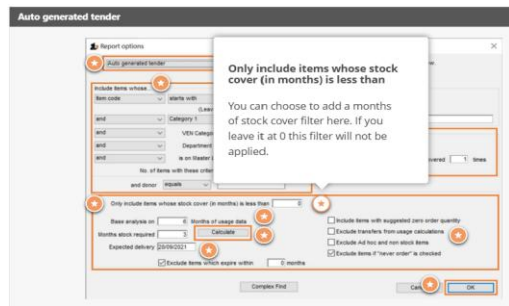
No.	Activity	Facilitation Method	Time Allotted
1.	Auto generated tender	Lecturette/ group demonstration	15 minutes

### Activity 1: Auto generated tender

**Step 1:** Inform participants that mSupply can automatically create a suggested tender based upon your previous usage and projected demand. Lets look at how this works step by step.

The screenshots show the 'Auto generated tender' window with the following callouts:

- Auto generated tender:** This is the window you will use to create an auto generated tender. It may look familiar because it's the same window as that used for the Item Usage report, with some minor changes.
- Include items whose...:** This is your classic item filter. You can apply any item filters you wish, or leave it blank to include all items.
- Builds:** This filter allows you to take into account any stock which may be used for planned builds.
- Calculations filter:** This section allows you to adjust how mSupply calculates the items and quantities you will put to tender.



**Step 2:** Lets look at the slide video for more emphases. Link is below.

[https://learn.msupply.foundation/pluginfile.php/1276/mod\\_scorm/content/1/res/data/video1.mp4](https://learn.msupply.foundation/pluginfile.php/1276/mod_scorm/content/1/res/data/video1.mp4)

**Step 3:** Now tell participants that now they know how to create a new generated tender. Appreciate them.

## Session 4.5: Set Standard Tender Conditions

### Objectives:

By the end of this session, the participants should be able to:

1. Explain list of standard conditions
2. Describe how to create and enter master condition list

Time; 20 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Introduction to Master conditions list and categories	Lecturette	5 minutes
2.	Creating and entering Master conditions list and categories	Lecturette/ group demonstration	15 minutes
3.			

### Activity 1: Introduction to Master conditions list and categories

**Step 1:** Tell participants that in this session we will be looking how to set standard tender conditions. Trainers should introduce this session using the information below.

Tenders are usually issued with a list of standard conditions. These broadly define how the tender will work including submission instructions, closing date, notifications of successful bids, terms of payment and many more.

You can add these individually to each tender but more mSupply also allows you to create master lists of tender conditions which can be entered once and then applied to all future tenders.

**Step 2:** Ask participants if they need more clarification.

### Activity 2: Creating and entering Master conditions list and categories

**Step 1:** We will now be looking at step by step on how to create Master list of tender conditions.



## 1. Tender Window

1

2

3

4

### Master conditions list and categories

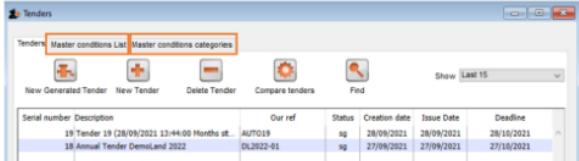
#### Tenders window

Navigate to the **Suppliers** tab and click on **Tenders**. This will open the **Tenders** window.

There are two other tabs which we will look at now:

**Master conditions List:** This tab allows you to input your tender conditions.

**Master conditions categories:** This tab allows you to categorise your tender conditions if you wish. For example, you could have categories such as Annual, Supplementary, or Standing Offer Arrangements.



Serial number	Description	Our ref	Status	Creation date	Issue Date	Deadline
19	Tender 19 (26/09/2021 13:44:00 Months st...	AUTO19	sg	26/09/2021	26/09/2021	26/10/2021
18	Annual Tender Demand 2022	DL2022-01	sg	27/09/2021	27/09/2021	27/10/2021

## 2. Setting up Master conditions categories

1

2

3

4

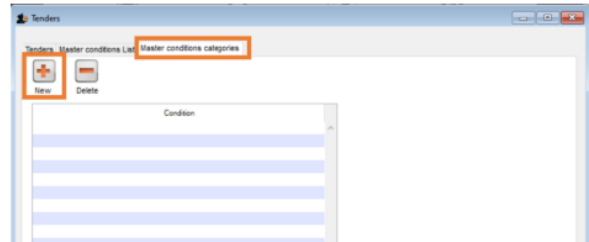
### Master conditions list and categories

#### Setting up Master conditions categories

If you wish to use Master conditions categories, it would be best to create these first so you can apply them to your conditions list later.

Click on the **Master conditions categories** tab and you will see this screen.

To add a category, click **New**.



Serial number	Description	Our ref	Status	Creation date	Issue Date	Deadline
19	Tender 19 (26/09/2021 13:44:00 Months st...	AUTO19	sg	26/09/2021	26/09/2021	26/10/2021
18	Annual Tender Demand 2022	DL2022-01	sg	27/09/2021	27/09/2021	27/10/2021

### 3. Add a new Master conditions category

Master conditions list and categories

1

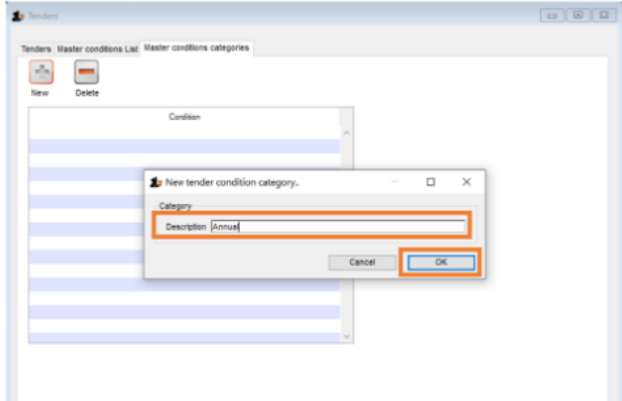
2

3

4

### Add a new Master conditions category

Enter your new category in the **Description** field, then click **OK**.



### 4. Deleting a category

Master conditions list and categories

1

2

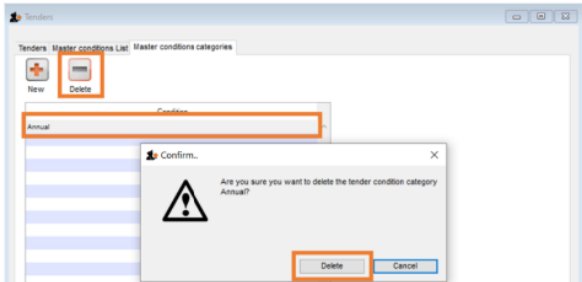
3

4

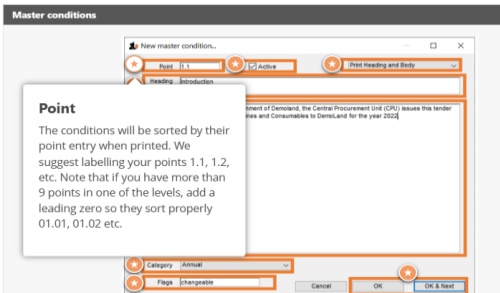
### Deleting a category

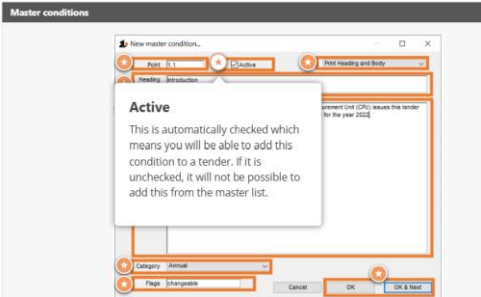
If you wish to delete a category, select it from the list, click **Delete** and **Confirm** when prompted.

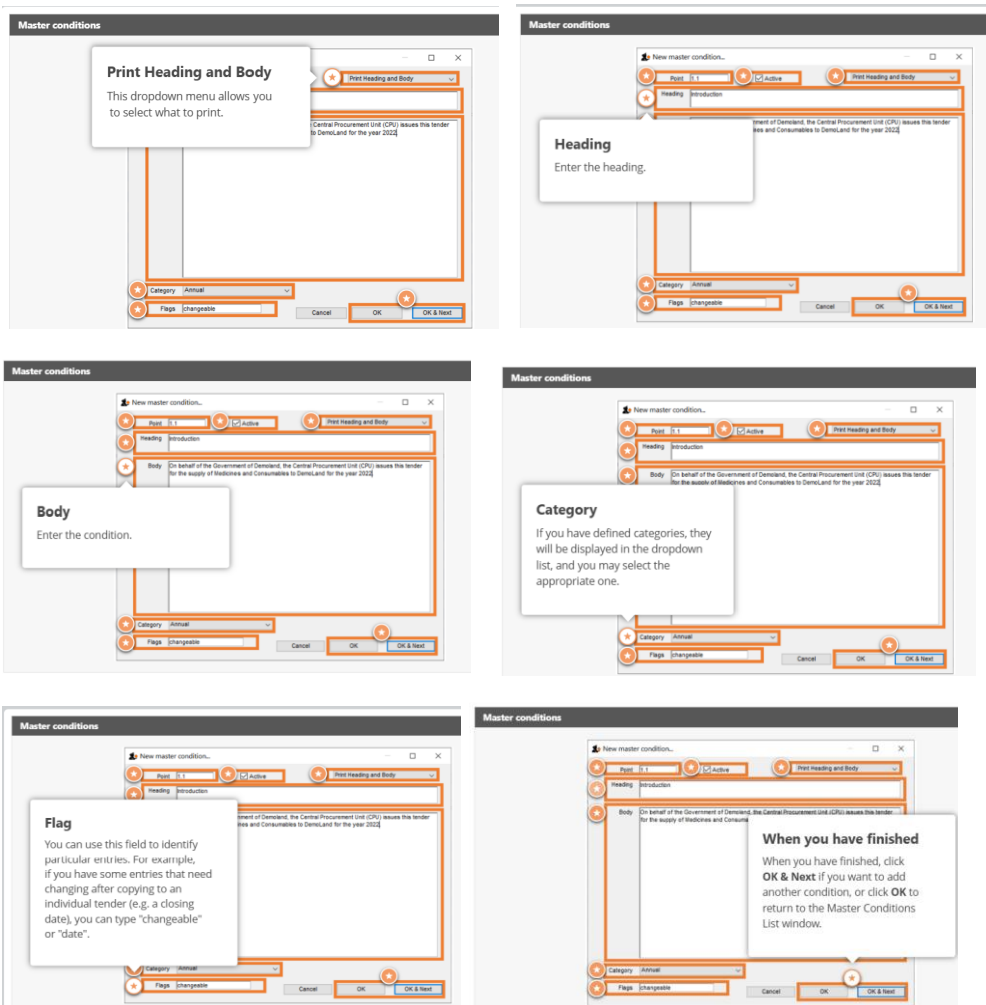
Note that you can only delete a category when no conditions are associated with it - otherwise you will need to change the category of the conditions first.



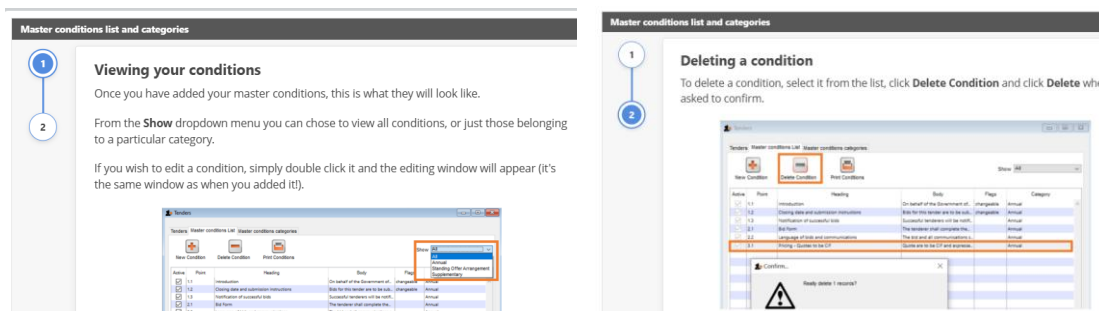
**Step 2:** let now learn step by step of how enter the details of your Master conditions.







**Step 3:** Once you have added your master conditions, the window will look like as seen below.



**Step 4:** Now you know how to set up master condition lists and categories, let's see how to add them to a tender. Please view process using the slide video link below.

[https://learn.msupply.foundation/pluginfile.php/1282/mod\\_scorm/content/1/res/data/video1.mp4](https://learn.msupply.foundation/pluginfile.php/1282/mod_scorm/content/1/res/data/video1.mp4)

**Step 5:** Excellent, appreciate the participants.

## Session 4.6: Add Suppliers to a Tender and Invite Responses

### Objectives:

By the end of this session, the participants should be able to:

1. Explain how to add supplier to tender
2. Describe the process of generating invitation to tender
3. Demonstrate how to upload tender to remote tender module

Time: 40 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Add Supplier to the tender	Lecturette/ group demonstration	10 minutes
2.	Generating invitation to tender	Lecturette/ group demonstration	15 minutes
3.	Uploading tender to Remote Tender Module	Lecturette/ group demonstration	15 minutes

### Activity 1: Add Supplier to the tender

**Step 1:** Welcome participants to this session. Trainer ensure the atmosphere is calm and friendly introducing an ice breaker.

**Step 2:** Inform the participants that we will looking at the step by step of how to add Suppliers to the tender.

1. Add Suppliers

## Add suppliers to tender

1

### Add suppliers

From the tender window, navigate to the **Choose Suppliers and Enter responses** tab.

Click **Add Suppliers**.

2

3

4

The screenshot shows the 'Edit Tender' window with the 'Choose Suppliers and Enter responses' tab selected. The 'Add Suppliers' button is highlighted with a red box. The window displays various fields for tender details and a table for supplier information.

## 2. Choose suppliers

### Add suppliers to tender

1

### Choose suppliers

A list of all your suppliers will be displayed.

To select a single supplier you can double click their name.

To add multiple suppliers, single click the suppliers while holding the **Ctrl** key (**Command** key on Mac), then click **Use**. Note: You can also press **Ctrl** and **A** on your keyboard to select all suppliers, if you wish.

If there is another supplier you wish to add to the tender but they are not in your system, you can click **New** to add them. Note: Only certain users have permission to this and this will be covered in a later level.

2

3

4

The screenshot shows the 'Choose name...' dialog box with the 'New' button highlighted by a red box. The dialog box has a search bar and a list of suppliers.

## 3. View Suppliers

### Add suppliers to tender

1

### View suppliers

The list of chosen suppliers have now been added.

Note: the **RTM Link** column indicates whether or not a supplier has been linked with the Remote Tender Module (checked if they have). We will discuss the RTM later.

2

3

4

The screenshot shows the 'Edit Tender' window with the 'Choose Suppliers and Enter responses' tab selected. A list of suppliers has been added to the table. The 'RTM Link' column is visible, indicating whether a supplier is linked with the Remote Tender Module.

Supplier Name	Supplier's code	Date Sent	Date Responded	Supplier ref	Total bid	Tender value	Currency	Total on PO	RTM Link
Arabic Distribution	ARC				0.00	0.00	USD	0	<input type="checkbox"/>
Abul Media	AZU				0.00	0.00	USD	0	<input type="checkbox"/>
Moranga Supplies	MDN				0.00	0.00	KUD	0	<input type="checkbox"/>
Island Media	Mund				0.00	0.00	USD	0	<input type="checkbox"/>

#### 4. Delete Suppliers

1

2

3

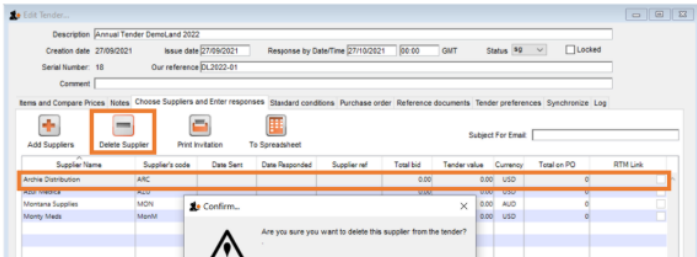
4

### Add suppliers to tender

## Delete suppliers

To delete a supplier from the tender, select them from the list.

Click **Delete Supplier**, and **Confirm** when prompted. (Note: this only deletes them from the tender, not from mSupply)



### Activity 2: Generating invitation to tender

**Step 1:** In this activity we will be learning how to create invitations. The step by step slides below will guide us.

#### 1. Print invitation

1

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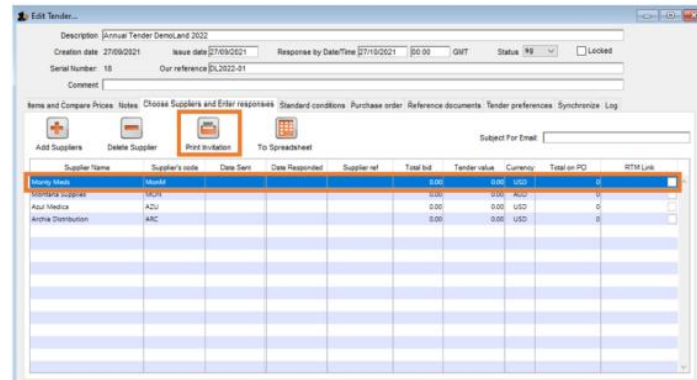
5

6

### Creating invitations

## Print invitation

Select your first supplier with a single click, then click **Print Invitation**.



## 2. Select form

1

2

3

4

5

6

### Creating invitations

#### Select form

Select which form you wish to generate - the **tender invitation** generates the list of items, while the **tender invitation condition** generates the list of conditions.

Then choose whether you'd like it sent to your **Printer**, saved as a **PDF file on disk**, **Email PDF** etc.

Once you have made your selections, click **OK**.

Note: If the default format of the Invitation letter does not meet your requirements, please contact mSupply tender support who will customise the print format to meet your individual requirements.

Printing options

Form to use: 

tender invitation condition

tender condition

tender estimated cost

☐ Remember this choice

## 3. Tender invitation condition

1

2

3

4

5

6

### Creating invitations

#### Tender invitation condition

This is an example of a **tender invitation condition** form.

**Introduction**  
On behalf of the Government of Demoland, the Central Procurement Unit (CPU) issues this tender for the supply of Medicines and Consumables to Demoland for the year 2022.

**Closing date and submission instructions**  
Bids for this tender are to be submitted in entirety by 5pm October 31st, 2021. They are to be submitted electronically with all forms signed

**Notification of successful bids**  
Successful tenderers will be notified within 2 weeks of tender closing date via email.

**Bid Form**  
The tenderer shall complete the bid according to the instructions sent to them via mSupply tender support.

**Language of bids and communications**  
The bid and all communications shall be written in English. Where there may be need to clarify certain items or conditions, the suppliers may contact

**Pricing - Quotes to be CIF**  
Please see to the CIF and associated in this total invoice

## 4. Tender invitation

1

2

3

4

5

6

### Creating invitations

#### Tender invitation

This is an example of a **tender invitation**.

To: Monty Meds

Issue Date: Monday, 27 September 2021  
Response Required by: Wednesday, 27 October 2021  
DL2022-01

Annexe 1- Items for tender- follows  
Total number of items: 2

Annex 1 : Items for tender

#	Item	Quantity	Suggeste Pack	Units	Total
---	------	----------	---------------	-------	-------

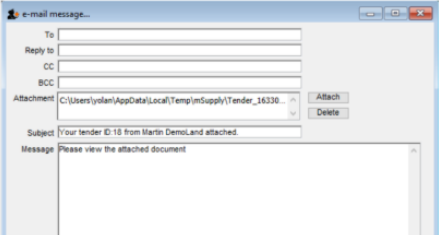
## 5. Email PDF

- 1
- 2
- 3
- 4
- 5
- 6

### Email PDF

If you choose **Email PDF** you can also email the suppliers directly, attaching any additional documents as required.

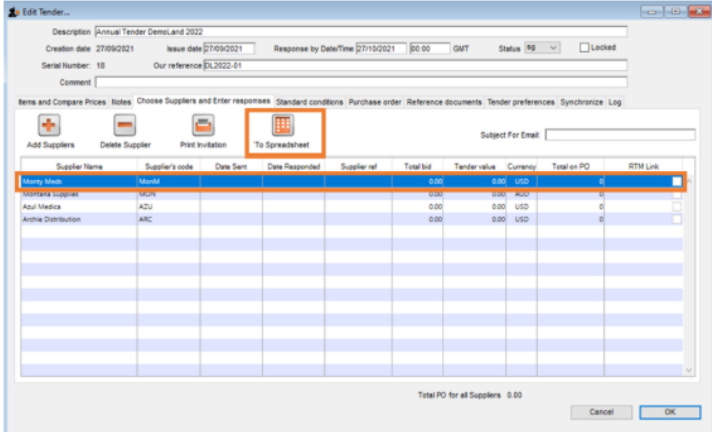
Note: to email directly from mSupply, contact mSupply Support who will set up an email server for you.



## 6. To Spreadsheet

- 1
- 2
- 3
- 4
- 5
- 6

### To Spreadsheet



Supplier Name	Supplier's code	Date Sent	Date Responded	Supplier ref	Total bid	Tender value	Currency	Total on PO	RTM Link
Martina's Insurance	ACU				0.00	0.00	USD	0	<input type="checkbox"/>
Abul Medicine	ACU				0.00	0.00	USD	0	<input type="checkbox"/>
Archie Distribution	ARC				0.00	0.00	USD	0	<input type="checkbox"/>

**Step 2:** We have created suppliers invitation.

### Activity 3: Uploading tender to Remote Tender Module (RTM)

**Step 1:** Ask participants what they understand by Remote Tender Module. Take responses from them and use the note below to explain further.

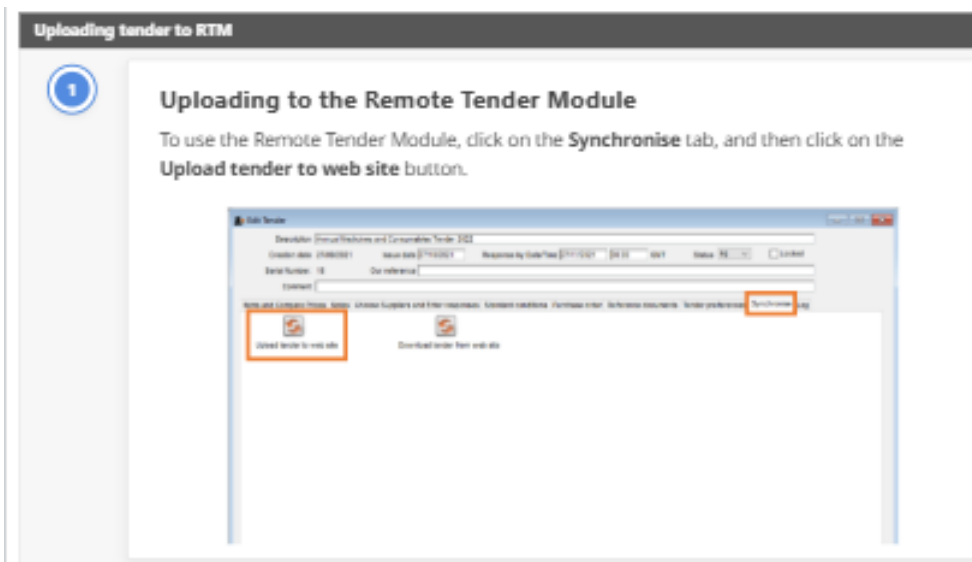
Remote Tender module (RTM) Is an online portal that allows suppliers to enter their own bids. This allows for greater transparency in the bidding process as no one is able to access the bids during the bidding period nor edit them after the bidding period is closed.



It also saves days to weeks of manual data entry and reduces the risk of transcription error.

Please note that you will need to contact mSupply support to help setting this up for each tender, as they will to contact suppliers and provide logins and passwords for the Remote Tender Module.

**Step 2:** for easy uploading to the Remote Tender Module, show participants the slide below.



**Step 3:** Noted, you will still need to individually send the item list and conditions to your suppliers. Appreciate the participants.

## Session 4.7: Receive and Enter Quotation from Suppliers

### Objectives:

By the end of this session, the participants should be able to:

1. Explain the process of entering suppliers quote
2. Demonstrate the process of suppliers respond
3. Describe process of downloading of quotes

Time: 45 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Manually enter suppliers quotes in mSupply		15 minutes
2.	Importing Suppliers response		15 minutes
3.	Download quotes from RTM		15 minutes

### Activity 1: Entering Suppliers Quotes

**Step 1:** Welcome participants to the session. Infor them that we will be looking at the step by step of how the enter suppliers' quotes.

#### 1. Select Supplier

1

2

3

4

5

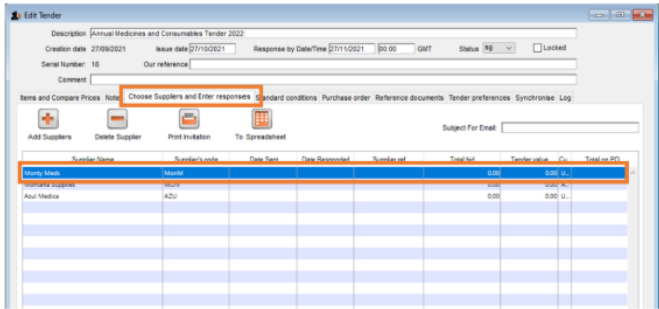
6

### Entering Supplier Quotes

#### Select Supplier

From the **Edit Tender** window, select the **Choose Suppliers and Enter responses** tab.

Double click on the **Supplier** for whom you want to enter responses.



## 2. Enter Details

Entering Supplier Quotes

1

2

3

4

5

6


### Enter Details

Enter the supplier's **reference** code (if applicable).

Enter the **Dates** fields:  
**Date sent:** The date the tender was sent to the supplier.  
**Date responded:** The date the supplier responded.  
**Valid til:** The date until which the supplier's responses are valid. After this date, the cost of the goods may change.

Select the **quote currency**.

To add specific item quotes, click **New line(s)**.



## 3. Select items which received a response

Entering Supplier Quotes

1

2

3

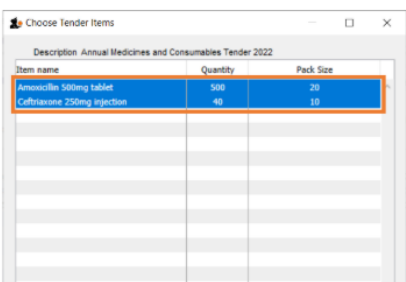
4

5

### Select items which received a response

Select the items from the tender for which the suppliers have submitted quotes.

To select all of them, you can press **Ctrl + A** on your keyboard, then click **Use**.



## 4. Select individual item to enter response

Entering Supplier Quotes

1

2

3

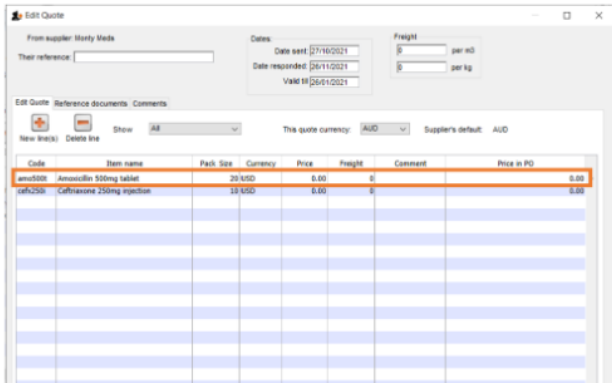
4

5

6

### Select individual item to enter response

Double click the item for which you wish to enter a response.



## 5. Enter individual item response

### Entering Supplier Quotes

1

#### Enter individual item response

Enter the **Price**, **Pack (size)**, and **Currency** (if different from the default).

2

If the Supplier has added a **Comment**, enter it now.

3

The **Price break** section can be used to note any % discounts offered by the Supplier if you order above a certain amount (the Price break quantity). Please note this is not automatically taken into account by mSupply when calculating price per pack.

4

Click **OK & Next** to continue adding responses, or click **OK** if you are finished.

5

6

## 6. Review quote

### Entering Supplier Quotes

1

#### Review quote

When you have finished entering the supplier's responses, you will return to the **Edit Quote** window where you can review the quotes entered.

2

Click **OK & Next** to enter quotes for the next supplier, or **OK** if you are finished.

3

4

5

6

## 7. All Suppliers Responses

### Entering Supplier Quotes

2

#### All Suppliers' Responses

Once you have entered all suppliers' responses, the **Choose Suppliers and Enter responses** tab will look like this.

3

The **Total bid** column refers to the total value of the supplier's bid.

4

The **Tender value** column refers to the value of goods awarded to that supplier (this is empty at the moment but will be filled once decisions are made).

5

6

7



### 3. Import tender

**Importing a supplier response**

**1**

**2**

**3**

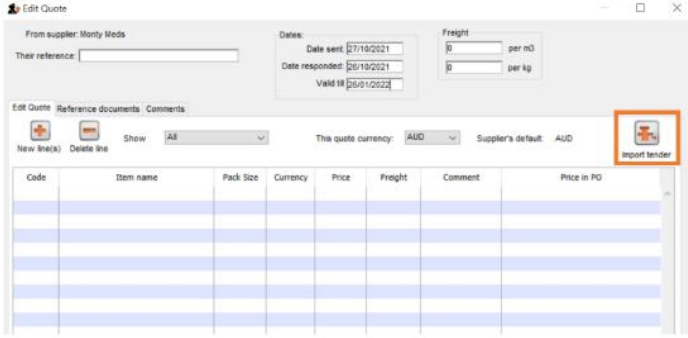
**4**

**5**

#### Import tender

Enter the relevant details of the quote as discussed previously.

When you are ready to import the template, click on the **Import tender** button.



The screenshot shows the 'Edit Quote' window. At the top, there are fields for 'From supplier: Monty Meds', 'Their reference', 'Dates' (Date sent: 27/10/2021, Date responded: 26/10/2021, Valid till: 26/01/2022), and 'Freight' (0 per m3, 0 per kg). Below these are tabs for 'Edit Quote', 'Reference documents', and 'Comments'. There are buttons for 'New line(s)', 'Delete line', 'Show', and a dropdown menu set to 'All'. A 'This quote currency' dropdown is set to 'AUD', and 'Supplier's default' is also 'AUD'. The 'Import tender' button is highlighted with a red box. Below is a table with columns: Code, Item name, Pack Size, Currency, Price, Freight, Comment, and Price in PO.

Code	Item name	Pack Size	Currency	Price	Freight	Comment	Price in PO

### 4. Select file

**Importing a supplier response**

**1**

**2**

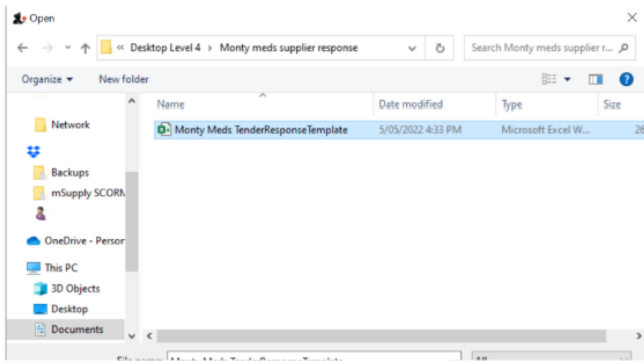
**3**

**4**

**5**

#### Select file

Select the correct file from your computer, then click **Open**.



The screenshot shows a file explorer window titled 'Open'. The address bar shows 'Desktop Level 4 > Monty meds supplier response'. The left sidebar shows the 'Documents' folder selected. The main pane shows a table of files. The file 'Monty Meds TenderResponseTemplate' is selected.

Name	Date modified	Type	Size
Monty Meds TenderResponseTemplate	5/05/2022 4:33 PM	Microsoft Excel W...	26

### 5. Import completed

**Importing a supplier response**

**1**

**2**

**3**

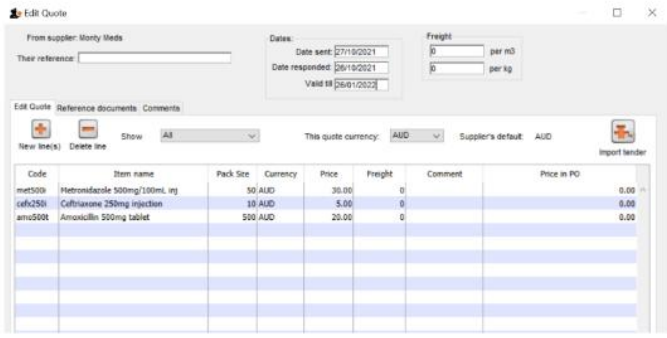
**4**

**5**

#### Import complete

Success! The supplier's bid has been imported.

Click **OK** to close this window (or **OK & Next** to edit the next supplier's quote).



The screenshot shows the 'Edit Quote' window with the imported data. The 'Import tender' button is still visible. The table now contains three rows of data.

Code	Item name	Pack Size	Currency	Price	Freight	Comment	Price in PO
met500	Metronidazole 500mg/100ml inj	50 AUD	AUD	30.00	0		0.00
cef250	Ceftriaxone 250mg injection	10 AUD	AUD	5.00	0		0.00
amu200t	Amoxicillin 500mg tablet	500 AUD	AUD	20.00	0		0.00



## Session 4.8: Add Comments and Attach Documents

### Objectives:

By the end of this session, the participants should be able to:

1. Describe how to add suppliers comment to tender
2. Explain the process of adding document to tender

Time 15 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Adding suppliers comment	Lecturette/ group demonstration	5 minutes
2.	Adding Documents	Lecturette/ group demonstration	10 minutes

### Activity 1: Adding suppliers comment

**Step 1:** Tell participants that if you or the supplier have any overall tender comments or questions, these can be recorded. Let look at how to add overall tender comments.

1. Select the supplier

**Adding overall tender comments**

1

2

### Select the supplier

Double click on the supplier for whom you wish to record a comment.

The screenshot shows the 'Edit Tender' window in mSupply. The 'Choose Suppliers and Enter responses' tab is active. A table lists suppliers with columns: Supplier Name, Supplier's code, Date Sent, Date Responded, Supplier ref, Total bid, Tender value, Cu., and Total on PO. The table contains three rows of data:

Supplier Name	Supplier's code	Date Sent	Date Responded	Supplier ref	Total bid	Tender value	Cu.	Total on PO
Honey Meds	Med01	27/10/2021	28/10/2021		600.00	6.00	A.L.	
Montana Supplies	MDN	27/10/2021	25/11/2021		1,884.00	0.00	A.L.	
Azul Medica	AZU	27/10/2021	25/11/2021		1,274.00	0.00	A.L.	



## 2. Add comment

Adding overall tender comments

1

2

### Add comment

Select the **Comments** tab, then enter the relevant comments in the provided fields.

Click **OK & Next** to add comments for the next supplier, or click **OK** to return to the **Choose Suppliers and Enter Responses** tab.

## Activity 2: Adding Documents

**Step 1:** Inform participants that if the supplier has provided any documents which need to be recorded, these can be uploaded to the Tender Module. This makes it easier to keep all the documentation relevant to the tender in one place.

**Step 2:** Let look at step by step of how to add documents to Tender Module.

### 1. Select supplier

Adding documents

1

2

3

4

### Select supplier

Double click on the supplier for whom you wish to upload a document.

Supplier Name	Supplier's code	Date Sent	Date Responded	Supplier ref	Total bid	Tender value	Co.	Total on PO
Henry Webb	W000	27/10/2021	26/11/2021		990.00	6.00	A	
Reference Suppliers	W000	27/10/2021	26/11/2021		1.844.00	8.00	A	
Abul Matroob	A2U	27/10/2021	26/11/2021		1.274.00	8.00	A	

### 2. Upload document

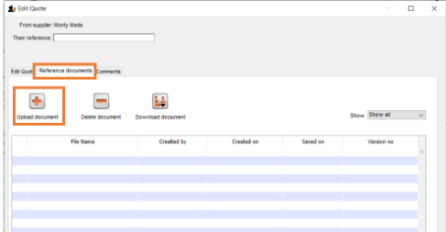
**Adding documents**

- 1
- 2
- 3
- 4

**Upload document**

Select the **Reference documents** tab, and click **Upload document**.

Follow the prompts to upload the file from your computer.



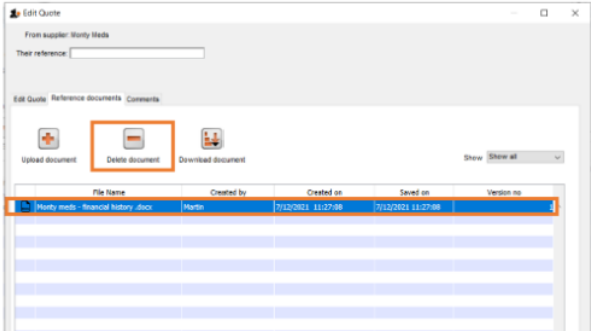
### 3. Viewing documents

**Adding documents**

- 1
- 2
- 3
- 4

**Deleting documents**

If you need to delete a document, select the document and click **Delete document**.



File Name	Created by	Created on	Saved on	Version no
Worley meds - financial history .docx	Martin	7/12/2021 11:27:08	7/12/2021 11:27:08	1

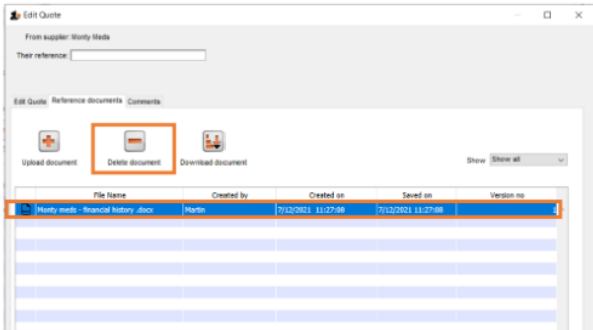
### 4. Deleting documents

**Adding documents**

- 1
- 2
- 3
- 4

**Deleting documents**

If you need to delete a document, select the document and click **Delete document**.



File Name	Created by	Created on	Saved on	Version no
Worley meds - financial history .docx	Martin	7/12/2021 11:27:08	7/12/2021 11:27:08	1

**Step 3:** Conclude this session by given the participants a rib cracking joke or a riddle.

## Session 4.9: Analyze and Compare Supplier Responses

### Objective:

By the end of this session, the participants should be able to:

1. Explain how to analyze and compare suppliers responses

Time: 10 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Analyse and Compare supplier responses and prices.	Lecturette/ group demonstration	10 minutes

### Activity 1: Analyse and Compare supplier responses and prices.

**Step 1:** We wil quickly look at steps on how to analyse and compare supplier responses to enable select the preferred suppliers.

1. Select Item

1

2

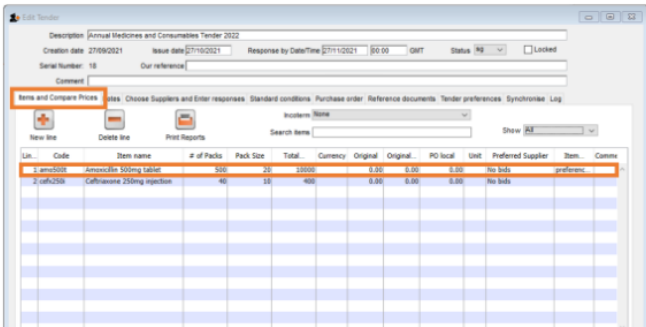
3

4

#### Select Preferred Suppliers

#### Select Item

Navigate to the **Items and Compare Prices** tab, and double click the item for which you wish to view and compare supplier bids.



Ln	Code	Item name	# of Packs	Pack Size	Total	Currency	Original	Original	PO local	Unit	Preferred Supplier	Item	Comment
1	000000	Amoxicillin 500mg tablets	100	10	10000	0.00	0.00	0.00	No bids				
2	000000	Ceftriaxone 250mg injection	40	10	400	0.00	0.00	0.00	No bids				

## 2. View Responses

Select Preferred Suppliers

1

2

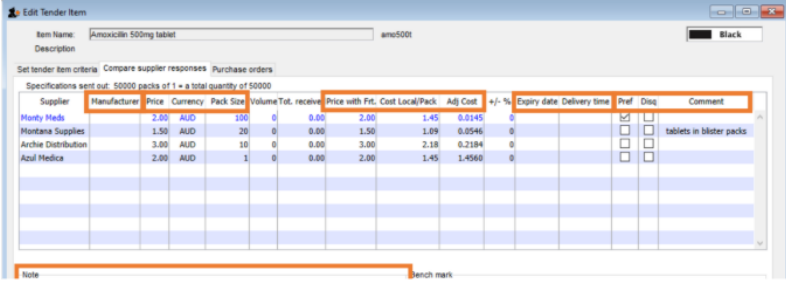
3

4

### View Responses

You will see the various supplier responses for that item.

The lowest-priced supplier will be highlighted in Blue (if there are two lowest-priced suppliers, they will both be in Blue).



## 3. Select your Preferred Supplier

Select Preferred Suppliers

1

2

3

4

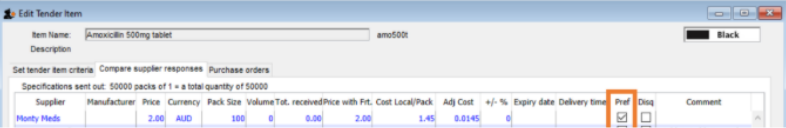
### Select your Preferred Supplier

Select your preferred supplier by checking the relevant **checkbox**.

Remember that while price is an important factor, there may be other reasons you select a supplier who isn't the lowest bidder e.g. expiry date, delivery dates etc. Where this occurs, it would be useful to make a Note for future reference.

Click **OK & Next** to evaluate the next item on your tender, or **OK** if you are finished.

**Note:** if you need to clarify something and cannot make a decision now, you are able to come back to these items later.



#### 4. Review your Preferred Suppliers

1

2

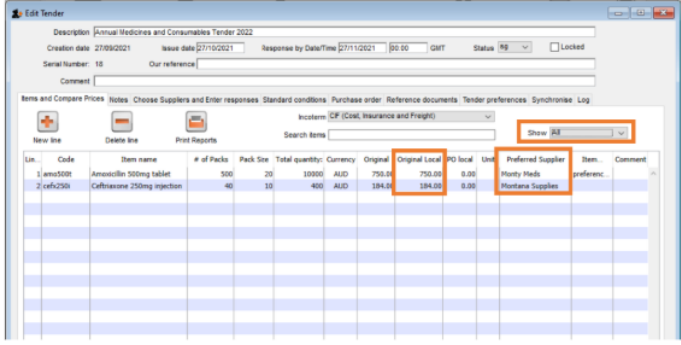
3

4

### Select Preferred Suppliers

## Review your Preferred Suppliers

When you have finished selecting your suppliers, you are able review your tender list including **Item name**, **Original Local (cost)** and **Preferred Suppliers**.



The screenshot shows the 'Edit Tender' window for 'Annual Medicines and Consumables Tender 2022'. It includes fields for Creation date, Issue date, Response by Date/Time, Bid ID, and Status. Below these are tabs for 'Items and Compare Prices', 'Notes', 'Choose Suppliers and Enter responses', 'Standard conditions', 'Purchase order', 'Reference documents', 'Tender preferences', 'Synchronise', and 'Log'. A table of items is displayed with columns: Lin, Code, Item name, # of Packs, Pack Size, Total quantity, Currency, Original, Original Local, PO local, Unit, Preferred Supplier, Item, and Comment. Two items are listed: 1. amox500t (Amoxicillin 500mg tablet) and 2. cefx250i (Cefixime 250mg injection). The 'Preferred Supplier' for item 2 is 'Morty Meds'.

Lin	Code	Item name	# of Packs	Pack Size	Total quantity	Currency	Original	Original Local	PO local	Unit	Preferred Supplier	Item	Comment
1	amox500t	Amoxicillin 500mg tablet	500	20	10000	AUD	750.00	750.00	0.00		Morty Meds	preferenc	
2	cefx250i	Cefixime 250mg injection	40	10	400	AUD	194.00	194.00	0.00		Morty Meds	preferenc	

**Step 2:** Appreciate the participants for their time.

## Session 4.10: Tender Reports

### Objective:

By the end of this session, the participants should be able to:

1. Explain and demonstrate how to generate tender report

Time: 20 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Tender Reports	Lecturette/ group demonstration	20 minutes

### Activity 1: Tender Reports

**Step 1:** Inform participants that this is a short session where we will be looking at Tender reports for preferred suppliers only. Lets look at step by step.

**Tender Reports**

▼ Preferred Suppliers Only

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Preferred supplier report for tender ref. 2024/001													
2	Item name	Pack	Unit size	Unit quantity	Units	Preferred supplier	Currency	Item description	Quoted price	Quoted pack size	Unit cost	Adjusted price	Item description	Comments
3	Amoxicillin 500mg tablet	100	20	2000		Montana Supplies	10 AUD	Amoxicillin 500mg tablet	5.0	100	5.0	7.5	100	
4	Amoxicillin 500mg injection	100	20	2000		Montana Supplies	10 AUD	Amoxicillin 500mg injection	5.0	100	5.0	7.5	100	

The **Preferred Suppliers Only** report will generate a list of all your tender items. Information is shown for items where you chose a Preferred Supplier.

**Tender Reports**

▼ Winning Tender Lines

	A	B	C	D	E	F	G	H	I
1	Winning tender prices for tender Annual Medicines and Consumables Tender 2022								
2	Item name	Pack	Unit size	Unit quantity	Units	Preferred supplier	Currency	Item description	Quoted price
3	Amoxicillin 500mg tablet	100	20	2000		Montana Supplies	10 AUD	Amoxicillin 500mg tablet	5.0
4	Amoxicillin 500mg injection	100	20	2000		Montana Supplies	10 AUD	Amoxicillin 500mg injection	5.0

The **Winning Tender Lines** report will show you only the items for which a supplier has been chosen. It shows you item prices, as well as the total cost in the local currency.

**Tender Reports**

▼ All Supplier Responses

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	All supplier responses for tender ref. 2024/001													
2	Item name	Pack	Unit size	Unit quantity	Units	Preferred supplier	Currency	Item description	Quoted price	Quoted pack size	Unit cost	Adjusted price	Item description	Comments
3	Amoxicillin 500mg tablet	100	20	2000		Montana Supplies	10 AUD	Amoxicillin 500mg tablet	5.0	100	5.0	7.5	100	
4	Amoxicillin 500mg injection	100	20	2000		Montana Supplies	10 AUD	Amoxicillin 500mg injection	5.0	100	5.0	7.5	100	

The **All Supplier Responses** report, as the name suggests, shows you every supplier response for each item.

**Tender Reports**

▼ Supplier Quotes with Adjusted Price

	A	B	C	D
1	ITEMS/ Supplier Price	Monty Meds	Montana Supplies	Azul Medica
2	Ceftriaxone 250mg injection	5	4.6	6.85
3	Amoxicillin 500mg tablet	7.5	15	10

The **Supplier Quotes with Adjusted Price** report shows you each supplier's quote for each item after being adjusted for pack size differences.

**Tender Reports**

▼ Supplier Quotes for Each Item

	A	B	C	D	E	F	G	H	I
1	Quote For Items								
2	Item name	Pack	Unit size	Unit quantity	Units	Preferred supplier	Currency	Item description	Quoted price
3	Amoxicillin 500mg tablet	100	20	2000		Montana Supplies	10 AUD	Amoxicillin 500mg tablet	5.0
4	Amoxicillin 500mg injection	100	20	2000		Montana Supplies	10 AUD	Amoxicillin 500mg injection	5.0

The **Supplier Quotes for Each Item** report shows the different quotes from each supplier per item.

**Tender Reports**

▼ Tender Lines with Predicted Cost

Report options

Show: **REPORT WITH PREVIOUS PURCHASE PRICE**

☐ Open report in excel

Cancel OK

If you have entered previous purchase prices for the items in your tender, mSupply can use those historical prices to estimate how much your tender will cost. This can give you a ballpark figure of the cost of the tender for budgeting purposes.

**Tender Reports**

> Supplier Quotes for Each Item

> Tender Lines with Predicted Cost

> **Tender Lines: Lowest Price Not Chosen**


A	B	C	D	E	F	G	H	I	J
Item code	Item name	Units	Pack size	Quantity	Chosen price	Lowest supplier	Lowest price	Comment	
1	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
2	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
3	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
4	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
5	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
6	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
7	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
8	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
9	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
10	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
11	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
12	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
13	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
14	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
15	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
16	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
17	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
18	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
19	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
20	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
21	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
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26	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
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30	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
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34	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
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36	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
37	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
38	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
39	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
40	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
41	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
42	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
43	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
44	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
45	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
46	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
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53	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
54	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
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56	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
57	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
58	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
59	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
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64	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
65	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
66	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
67	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
68	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
69	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
70	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
71	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
72	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
73	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
74	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
75	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
76	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
77	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
78	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
79	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
80	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
81	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
82	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
83	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
84	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
85	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
86	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
87	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
88	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
89	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
90	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
91	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
92	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
93	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
94	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
95	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
96	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
97	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
98	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
99	1000000	1000000	1000	1000	1000	1000	1000	1000	1000
100	1000000	1000000	1000	1000	1000	1000	1000	1000	1000

The **Tender Lines: Lowest Price Not Chosen** report will identify the items for which you did not choose the lowest-priced supplier, and give you the difference in value.

Note: there may be a good reason the lowest-priced supplier was not chosen, such as an unacceptable expiry date or lengthy delivery time.

**Summary**

You can practice running these reports to see which one has the information you need.



## Session 4.11: Create Purchase Orders from Tender

### Objectives:

By the end of this session, the participants should be able to:

1. Describe the process to create purchase order for tender split delivery
2. Describe the process to create purchase order for tender single delivery

Time: 30 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Create Purchase Order from Tender – Split Deliveries	Lecturette/ group demonstration	15 minutes
2.	Creating Purchase Order from Tender – Single Delivery	Lecturette/ group demonstration	15 minutes

### Activity 1: Create Purchase Order from Tender – Split Deliveries

**Step 1:** Tell participants that we will be generating purchase order with split deliveries. Now, what is purchase order? Participants should be able to give you some answers. After few responses, Trainer should explain.

A purchase Order is used to order stock from an external supplier i.e. one who do not use mSupply. However, you can generate Purchase Order form from the tender module.

**Step 2:** let look at how to generate purchase order with split deliveries.

1. Set Tender Preference



## Create Purchase Order from Tender - Split Deliveries

1

### Set Tender Preferences

Navigate to the **Tender preferences** tab.

For the PO calculation method, select **Distribute Tender quantity evenly** (this will split the tendered amount evenly across the deliveries).

Ensure the **Create split deliveries** checkbox is ticked.

Click **OK** to consolidate these changes.

The screenshot shows the 'Edit Tender' window with the 'Tender preferences' tab selected. The 'PO calculation method' dropdown is set to 'Distribute Tender quantity evenly'. Other fields include 'Description: Annual Medicines and Consumables Tender 2022', 'Creation date: 27/09/2021', 'Issue date: 27/10/2021', 'Response by Date/Time: 27/11/2021', 'Status: 19', and 'Bench mark supplier: None'.

## 2. Creating Purchase Orders

## Create Purchase Order from Tender - Split Deliveries

1

### Creating Purchase Orders

Re-open your tender, and navigate to the **Purchase Orders** tab.

Click on **Create Blank POs**. You will be creating the same number of POs as the number of deliveries you wish to receive from each supplier.

The screenshot shows the 'Edit Tender' window with the 'Purchase orders' tab selected. The 'Create Blank POs' button is highlighted. Other buttons include 'Delete PO', 'Convert to SO', 'Show selected PO', 'Print acceptance letter', and 'Fill quantities'. Below the buttons is a table with columns: PO number, Supplier, Description, Status, Requested Delivery, Total in PO, Currency, and Target date.

## 3. Select Suppliers

## Create Purchase Order from Tender - Split Deliveries

1

### Select Supplier(s)

**Select** the supplier(s) for which you are creating a purchase order.

Enter an **Expected delivery date**.

Click **OK**.

The screenshot shows the 'Show selected suppliers...' dialog box. The 'Expected delivery date' is set to 14/02/2022. Two suppliers are listed in a table:

Code	Supplier Name	Currency code
Monly	Monly Meds	AUD
Azul	Azul Medica	AUD

#### 4. Continue adding Blank Purchase Orders

- 1
- 2
- 3
- 4
- 5
- 6

### Continue adding Blank Purchase Orders

Repeat the previous two steps until you have the number of Blank Purchase Orders required.

In this example, there are 2 purchase orders to each supplier, with requested delivery dates of 4/02/2022 and 4/08/2022.

PO number	Supplier	Description	Status	Requested Delivery	Total in PO	Currency	Target days
43	Montana Supplies	Annual Medicines and Consumables	tn	4/08/2022	0	AUD	1
41	Montana Supplies	Annual Medicines and Consumables	tn	4/02/2022	0	AUD	1
40	Monty Meds	Annual Medicines and Consumables	tn	4/02/2022	0	AUD	1
42	Monty Meds	Annual Medicines and Consumables	tn	4/08/2022	0	AUD	1

#### 5. Fill Quantities

- 1
- 2
- 3
- 4
- 5
- 6

### Fill Quantities

Select the purchase orders for which you wish to enter quantities.

Click the **Fill Quantities** button.

Click **Yes** when asked to confirm.

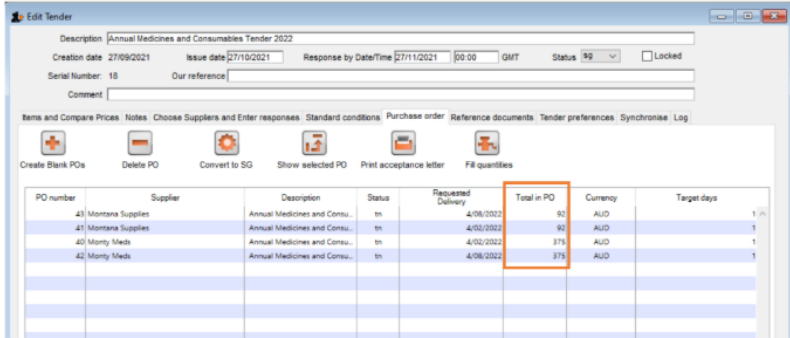
PO number	Supplier	Description	Status	Requested Delivery	Total in PO	Currency	Target days
43	Montana Supplies	Annual Medicines and Consumables	tn	4/08/2022	0	AUD	1
41	Montana Supplies	Annual Medicines and Consumables	tn	4/02/2022	0	AUD	1
40	Monty Meds	Annual Medicines and Consumables	tn	4/02/2022	0	AUD	1
42	Monty Meds	Annual Medicines and Consumables	tn	4/08/2022	0	AUD	1

## 6. Quantities and Values filled

**Create Purchase Order from Tender - Split Deliveries**

**Quantities and Values filled**

You can see that the **Total in PO** column has been filled.



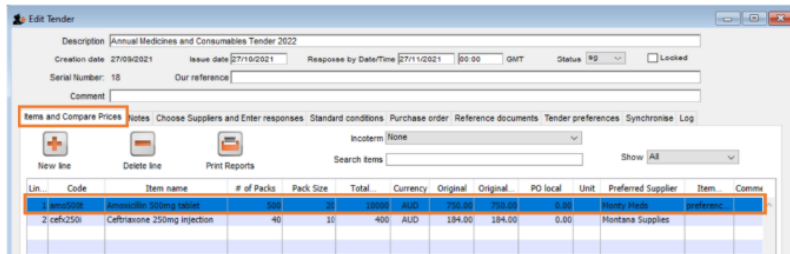
PO number	Supplier	Description	Status	Requested Delivery	Total in PO	Currency	Target days
41	Montana Supplies	Annual Medicines and Consumables	tn	4/06/2022	92	AUD	1
42	Monty Meds	Annual Medicines and Consumables	tn	4/06/2022	375	AUD	1
43	Monty Meds	Annual Medicines and Consumables	tn	4/06/2022	375	AUD	1

## 7. Changing Quantities on a Purchase Order

**Create Purchase Order from Tender - Split Deliveries**

**Changing Quantities on a Purchase Order**

If you need to change the quantity on a Purchase Order, navigate to the **Items and Compare Prices** tab and select the item.



Lin	Code	Item name	# of Packs	Pack Size	Total	Currency	Original	Original	PO local	Unit	Preferred Supplier	Item	Comma
1	amoxicl	Amoxicillin 500mg tablet	900	30	10000	AUD	750.00	750.00	0.00		Monty Meds	preferenc	
2	cefaz250	Cefazalone 250mg injection	40	10	400	AUD	184.00	184.00	0.00		Montana Supplies		

Within the item window, navigate to the **Purchase order** tab.

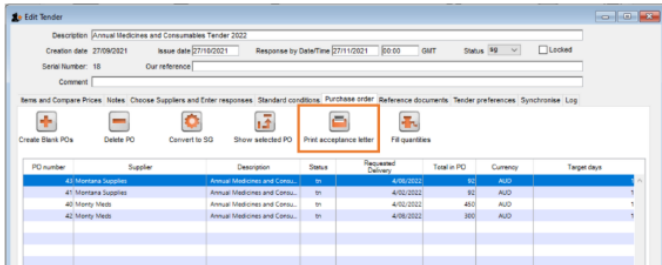
## 8. Printing Acceptable Letters

**Create Purchase Order from Tender - Split Deliveries**

**Printing Acceptance Letters**

After you have created your Purchase Orders in the tender module, you can print an acceptance letter and send it to your suppliers along with any other required paperwork.

Select a purchase order and click the **Print acceptance letter** button.



## 9. Convert to SG

Create Purchase Order from Tender - Split Deliveries

5

6

7

8

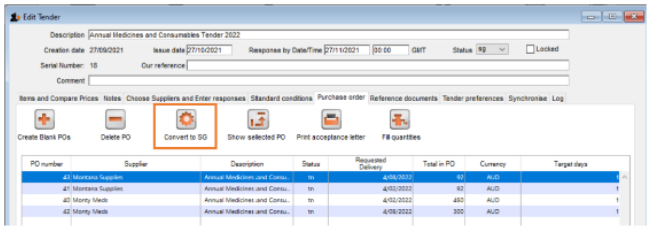
9

10

### Convert to SG

When you are finished with your purchase order, review it carefully.

If no other changes need to be made, select each purchase order and click **Convert to SG**. This will change the status of your purchase order from tn (referring to the tender module) to sg (suggested - used in the purchase order module). You can make further edits to these POs in the Purchase Order module if required.



PO number	Supplier	Description	Status	Requested Delivery	Total in PO	Currency	Target days
47 Montana Supplies	Annual Medicines and Consumables	tn	4/05/2022	97	AUD	1	
47 Montana Supplies	Annual Medicines and Consumables	tn	4/05/2022	96	AUD	1	
47 Monty Mads	Annual Medicines and Consumables	tn	4/05/2022	450	AUD	1	
47 Monty Mads	Annual Medicines and Consumables	tn	4/05/2022	300	AUD	1	

## 10. Deleting a PO

Create Purchase Order from Tender - Split Deliveries

5

6

7

8

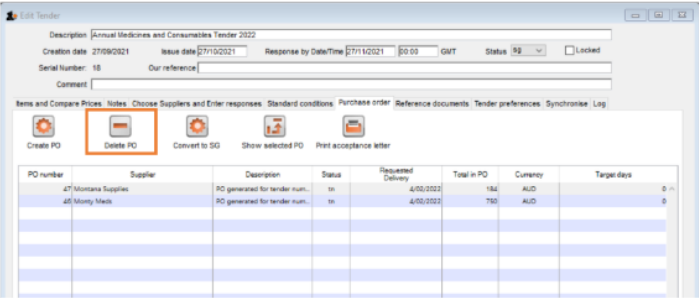
9

10

### Deleting a PO

If you need to delete a PO, you can do this at any stage BEFORE clicking the **Convert to SG** button.

Select the PO you wish to delete and click the **Delete PO** button.



PO number	Supplier	Description	Status	Requested Delivery	Total in PO	Currency	Target days
47 Montana Supplies	PO generated for tender num.	tn	4/05/2022	154	AUD	0	
47 Monty Mads	PO generated for tender num.	tn	4/05/2022	750	AUD	8	

## Activity 2: Creating Purchase Order from Tender – Single Delivery.

**Step 1:** In this activity, we will be looking at Creating Purchase Order from Tender - single delivery. Lets see the step by step.

### 1. Tender Preferences

### Create Purchase Order from Tender - Single Delivery

- Tender Preferences**  
Navigate to the **Tender preferences** tab.
- For the PO calculation method, select **Distribute Tender quantity evenly**.
- Ensure the **Create split deliveries** box is NOT ticked.
- Click **OK**.

## 2. Create Purchase Order

### Create Purchase Order from Tender - Single Delivery

- 
- Create Purchase Order**  
Navigate to the **Purchase order** tab.
- Click **Create PO** (note: this button was **Create Blank POs** when creating split deliveries).
- 
- 

PO number	Supplier	Description	Status	Requested Delivery	Total in PO	Currency	Target date

## 3. Purchase Order Created

### Create Purchase Order from Tender - Single Delivery

- 
- 
- Purchase Orders Created**  
Your Purchase Orders to each supplier are created.
- 
- 

PO number	Supplier	Description	Status	Requested Delivery	Total in PO	Currency	Target date
47	Monsieur Supplier	PO generated for tender num...	IN	15	154	AUD	0
48	Monsieur Supplier	PO generated for tender num...	IN	15	154	AUD	0

#### 4. Add Requested Delivery Date

1

2

3

4

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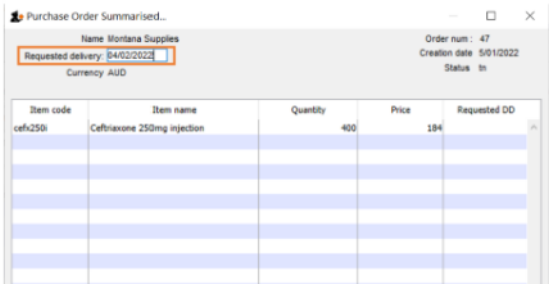
### Create Purchase Order from Tender - Single Delivery

## Add Requested Delivery Date

Double click on a Purchase Order to add a **Requested delivery date**.

Click **OK**.

Repeat this step for each Purchase Order.



#### 5. Convert to SG

1

2

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4

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### Create Purchase Order from Tender - Single Delivery

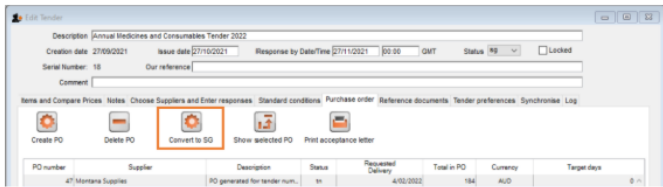
## Convert to SG

You can print an acceptance letter for each PO as you wish.

Now, purchase orders created in the tender module need to be sent to the purchase order module (as seen previously).

Select a purchase order and click the **Convert to SG** button.

Repeat this step for each purchase order.



### Step 2: Appreciate the participants

## Session 4.12: Create Calculated Purchase Order

### Objectives:

By the end of this session, the participants should be able to:

1. Explain the process of creating calculated purchase order

Time: 20 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Create a Calculated Purchase Order	Lecturette/ group demonstration	20 minutes

### Activity 1: Create a Calculated Purchase Order

**Step 1:** Tell participants that we will be looking at step by step of how to create a calculated purchase order.

1. Calculated Purchase Order


**Calculated Purchase Orders**

- 1
- 2
- 3
- 4
- 5

**Calculated Purchase Orders**

Navigate to the **Suppliers** tab.

Click on the **Calculated Purchase Orders** button.



The screenshot shows the mSupply navigator application. The top navigation bar includes icons for Customer, Suppliers, Items, Reports, Specials, Admin, and a help icon. The Suppliers tab is selected and highlighted with an orange box. Below the navigation bar, there is a grid of icons for various functions. The 'Calculated' icon, which shows a plus sign and a list icon, is highlighted with an orange box. Other icons include Tenders, Purchase orders, Blank, Outstanding, Goods receiving, Internal orders, and Supplier Invoices.

## 2. Selected ordering by supplier or Item

**Calculated Purchase Orders**

1

2

3

4

5

### Select ordering by supplier or item

Select whether you wish to create a calculated purchase order based on supplier(s) or item.

Order for all suppliers  
Order for all suppliers  
Order for some items only  
Order for one supplier

If you wish to order for some items only, you can select items based on how they've been categorised in your system.

Order for some items only

Click the Query button to find items to evaluate or select the item types shown below.

Query items...

Normal stock ☐ Items to evaluate 17/38  
Critical stock ☒  
On essential drug list ☒

If you wish to order by supplier, select items where the supplier is marked as 'Preferred'

## 3. Other info

**Calculated Purchase Orders**

1

2

3

4

5

### Other info...

Enter the Months (of) stock required manually, or use the **Calculate** button to obtain a more specific calculation.

Enter the number of **months usage to calculate average usage**.

Enter the **Requested delivery date**.

Ensure the **Exclude transfers from usage calculations** is NOT ticked.

Click **Create Order Now**.

New order

Order for some items only

Click the Query button to find items to evaluate or select the item types shown below.

Query items...

Normal stock ☐ Items to evaluate 17/38  
Critical stock ☒  
On essential drug list ☒

## 4. Open Purchase Order

**Calculated Purchase Orders**

1

2

3

4

5

### Open Purchase Order

If a Purchase Order has been generated (i.e. items do require ordering) you will see the following alert. Click **OK**.

Alert...

View Suppliers | Show purchase orders... from the menu to view your recently created purchase orders.

OK

To find and view your Calculated Purchase Order, click on the **List** button.

mSupply navigator

Icons: User profile, Person, Bottle, Calendar, Bicycle, Briefcase, Bell



## 5. Review the Purchase Order

1

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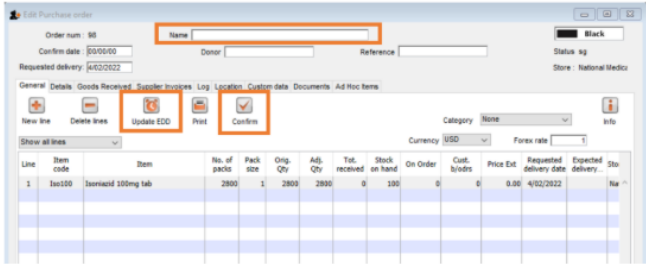
### Calculated Purchase Orders

#### Review the Purchase Order

Review the Purchase Order.

Enter the Name of the supplier (if necessary), and update any other details required.

When you are finished, click **Confirm**.



**Step 2:** End of the session.

## Session 4.13: Create Blank Purchase Order

### Objectives:

By the end of this session, the participants should be able to:

1. Demonstrate the process to create blank purchase order
2. Explain how to view and delete purchase order

10 minutes

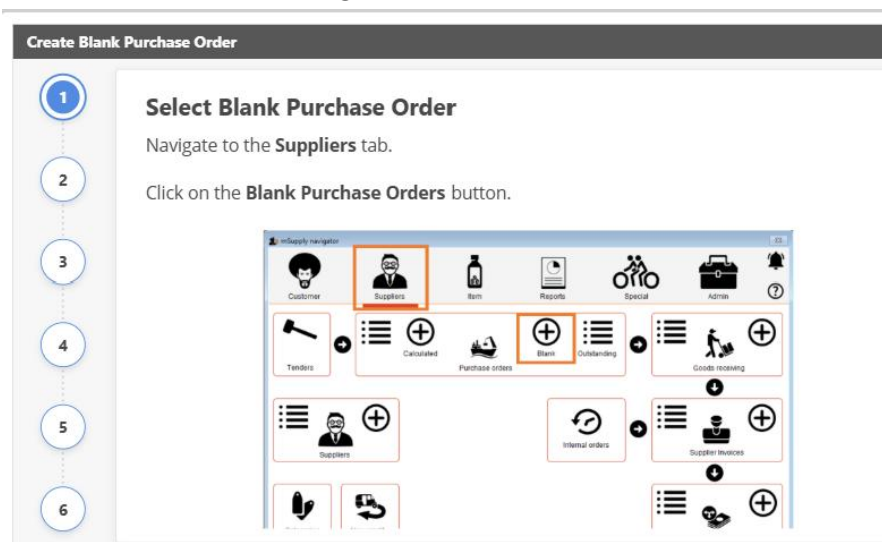
### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Create a Blank Purchase Order	Lecturette/ group demonstration	10 minutes
2.	Viewing and Deleting Purchase Orders	Lecturette/ group demonstration	10 minutes

### Activity 1: Create a Blank Purchase Order

**Step 1:** Inform participants that Blank Purchase Order is where we add items one at a time. Now let's learn how to create it.

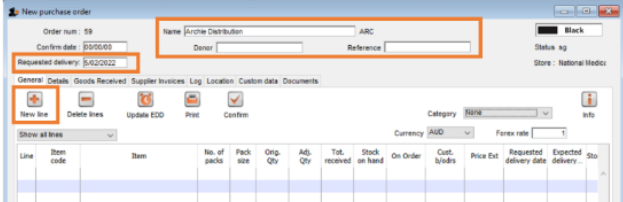
1. Select Blank Purchase Order



2. Enter Details of Purchase Order

### Create Blank Purchase Order


- 1
- 2 **Enter Details of Purchase Order**  
Enter the **Name** of the supplier to whom you are sending the purchase order.  
Enter any **Donor** details and **Reference** numbers as appropriate.  
Enter the **Requested Delivery Date**.  
To add items to your purchase order, click **New line**.
- 3
- 4
- 5
- 6



### 3. Select Item(s) and Quantity

### Create Blank Purchase Order

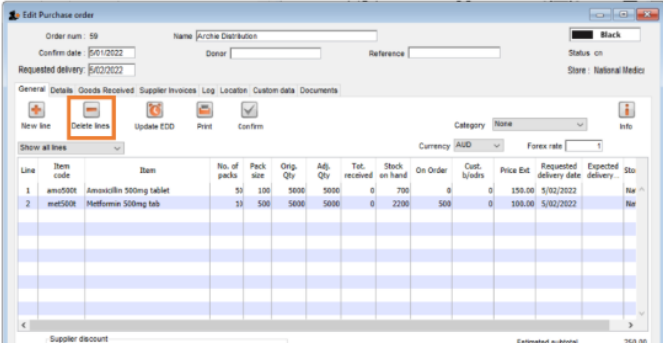
- 1
- 2
- 3 **Select Item(s) and Quantity**  
Search for and select the name of the **Item** you wish to order.  
Enter the **Number of packs** and **Pack size** you are ordering.  
The **Total quantity** will be automatically calculated.  
Enter an **Expected delivery date** if known (this can be updated at a later stage).  
If you know the **Pricing for this item**, enter these details now.  
Add any **Comments** (which will be printed on the purchase order for suppliers to see) or **Notes** (for internal use, and which can be shown on a Goods Receipt if the **Show notes on Goods Received** checkbox is ticked).  
Click **OK** if you are finished, or **OK & Next** to add another item.
- 4
- 5
- 6



### 4. Deleting an item

### Create Blank Purchase Order

- 1
- 2
- 3
- 4 **Deleting an Item**  
To delete an item from your purchase order, click on the affected line(s) and click **Delete lines**.
- 5
- 6



Line	Item code	Item	No. of packs	Pack size	Orig. Qty	Adj. Qty	Tot. received	Stock on hand	On Order	Cost. h/drs	Price Est	Requested delivery date	Expected delivery	Sto
1	amc500t	Amoxicillin 500mg tablet	51	100	5000	5000	0	700	0	0	150.00	1/10/2022		Ne
2	met500t	Metformin 500mg tab	11	500	5000	5000	0	2200	500	0	100.00	1/10/2022		Ne

## 5. Confirm

1

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### Create Blank Purchase Order

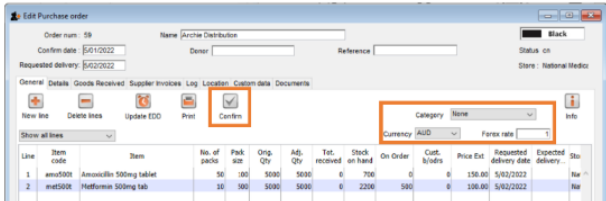
#### Confirm

Review all lines.

Select the purchase order **Category** if this has been set up in your system.

Check and change the **Currency** if needed.

If all details are correct and you are finished, click the **Confirm** button.



## 6. The Purchase Order is Complete

1

2

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### Create Blank Purchase Order

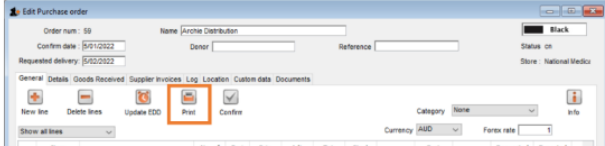
#### The Purchase Order is Complete

The Purchase Order is now complete!

To **Print** a copy (or save a copy to your computer), click the **Print** button and follow the prompts.

Click **OK** to return to the main screen.

Note: Do not finalize a Purchase Order until you have finished receiving all items from it. Once a Purchase Order is finalised, you can no longer receive a Goods Receipt against it.



## Activity 2: Viewing and Deleting Purchase Orders

**Step 1:** Let's look at step by step of how you view previous orders, edit a confirmed purchase order, edit a confirmed purchase order and delete a purchase order.

### 1. Viewing Purchase Order

## Viewing and Deleting Purchase Orders

1

### Viewing Purchase Orders

To see a list of previous purchase orders, or to continue working on one you started earlier, click the **List** button in the **Purchase orders** module.

2

3



## 2. Editing confirmed Purchase Order

### Viewing and Deleting Purchase Orders

1

### Editing Confirmed Purchase Orders

If you need to make a change to a purchase order that has already been confirmed, you can!

2

Open up the Purchase Order and select the item you wish to edit.

Enter the new **Number of packs** you wish to order.

3

Click **OK**.

## 3. Deleting a Purchase Order

### Viewing and Deleting Purchase Orders

1

### Deleting a Purchase Order

If you need to delete a purchase order, you can select it from the **List** of purchase orders | clicking on it, then click the **Delete** button.

2

3

Order no	Status	Date	Supplier	Locked	Target months	Lines	Confirm date	Comment
59	cn	5/01/2022	Archia Distribution	<input type="checkbox"/>	0	2	5/01/2022	
32	sg	9/11/2021	Asul Medica	<input type="checkbox"/>	0	1		PO generated for tender number: 25 No of...
31	sg	9/11/2021	Archia Distribution	<input type="checkbox"/>	0	3		PO generated for tender number: 25 No of...
29	cn	19/10/2021	Archia Distribution	<input type="checkbox"/>	0	2	19/10/2021	
17	sg	23/06/2021	Archia Distribution	<input type="checkbox"/>	1	1		Tender text for split orders No of PO Lines 1
7	sg	8/06/2021	Archia Distribution	<input type="checkbox"/>	0	1		PO generated for tender number: 1 No of...
6	sg	8/06/2021	Asul Medica	<input type="checkbox"/>	0	2		PO generated for tender number: 1 No of...
5	cn	26/07/2021	Archia Distribution	<input type="checkbox"/>	0	2	26/07/2021	
4	cn	20/05/2021	Archia Distribution	<input type="checkbox"/>	0	3	20/05/2021	
3	cn	19/05/2021	Montana Supplies	<input type="checkbox"/>	0	1	19/05/2021	
1	sg	19/05/2021	Montana Supplies	<input type="checkbox"/>	0	0		

Step 2: Appreciate participants for a job weldone.

## Session 4.14: Goods Receiving

### Objectives:

By the end of this session, the participants should be able to:

1. Explain the process of creating goods receipt
2. Demonstrate how to finalize original purchase order

Time: 25 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Creating a Goods Receipt and Suppliers Invoice	Lecturette/ group demonstration	15 minutes
2.	Finalising the Original Purchase Order	Lecturette/ group demonstration	10 minutes
3.			

### Activity 1: Creating a Goods Receipt and Suppliers Invoice

**Step 1:** Tell participants that Goods Receiving is used to receive stock from an external supplier who we previously ordered stock from via purchase order.

**Step 2:** Also inform them that we can create a Suppliers invoice directly from the Goods Receipt to add received stock to our inventory. Lets look at steps.

1. Creating a Good Receipt

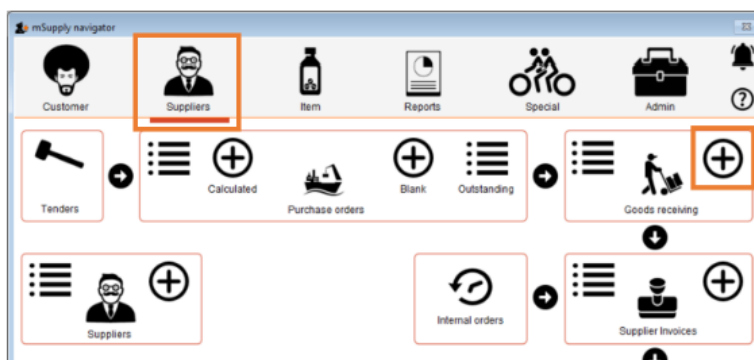
## Creating a Goods Receipt and Supplier Invoice

1

### Creating a Goods Receipt

Navigate to the **Suppliers** tab.

Click on the **New Goods Receiving** button.



## 2. Enter the Supplier

### Creating a Goods Receipt and Supplier Invoice

1

### Enter the Supplier

Enter the **Supplier** in the field, then press **tab** on your keyboard.

2

The screenshot shows the 'New goods received' form. The 'Supplier' field is highlighted with a red box and contains the text 'Smith'. Below the form, there is a table with columns: Line, Location, Item code, Item name, Batch, Exp date, Pack size, and Qty. The table is currently empty.

### 3. Select the corresponding purchase order

1

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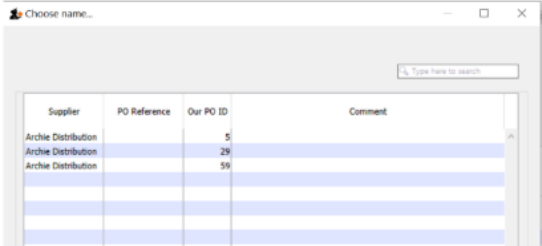
#### Creating a Goods Receipt and Supplier Invoice

### Select the corresponding purchase order

A list of all the purchase orders to that supplier will appear.

Select the order against which you wish to receive goods (Hint: look at **Our PO ID** which should be on the invoice sent to you by the supplier).

Click **OK**.



Supplier	PO Reference	Our PO ID	Comment
Archie Distribution		5	
Archie Distribution		29	
Archie Distribution		59	

### 4. Enter Necessary Details

1

2

3

4

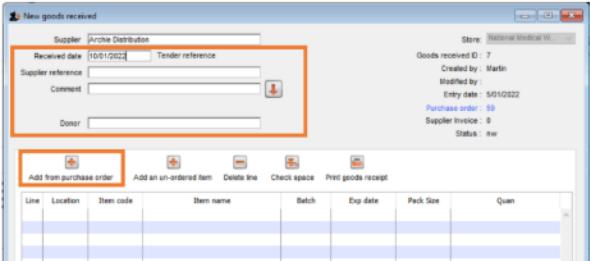
5

#### Creating a Goods Receipt and Supplier Invoice

### Enter Necessary Details

Enter the **Received date**, as well as any other necessary details such as **Supplier reference**, **Comment**, or **Donor**.

To receive goods from the purchase order, click **Add from purchase order**.



Line	Location	Item code	Item name	Batch	Exp date	Pack size	Quan

### 5. Select Items to Receive

1

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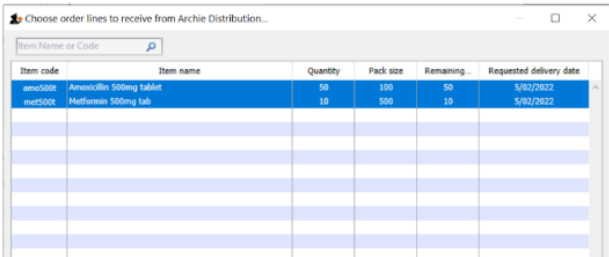
5

#### Creating a Goods Receipt and Supplier Invoice

### Select Items to Receive

You will be shown a list of items from the purchase order you selected.

Select the items you are receiving, then click **Use**. You can receive multiple items at once (and change the quantity received later).



Item code	Item name	Quantity	Pack size	Remaining...	Requested delivery date
am5000	Amoxicillin 500mg tablet	50	100	50	5/02/2022
met5000	Mefenamic 500mg tab	10	500	10	5/02/2022



## 6. Enter Item Details

Creating a Goods Receipt and Supplier Invoice

1

2

3

4

5

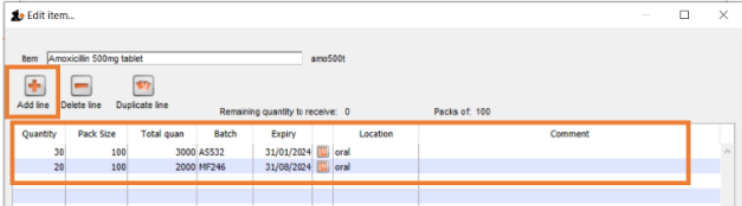
6

### Enter Item Details

For each item, a detailed window will appear.

Update the received **Quantity**, **Pack Size**, **Batch**, **Expiry** and the **Location** where you will keep the stock.

If you are splitting the delivery into separate locations or multiple batches have arrived, you can enter the details in this screen. Click **Add line**.



## 7. Finalize the Goods Receipt

Creating a Goods Receipt and Supplier Invoice

4

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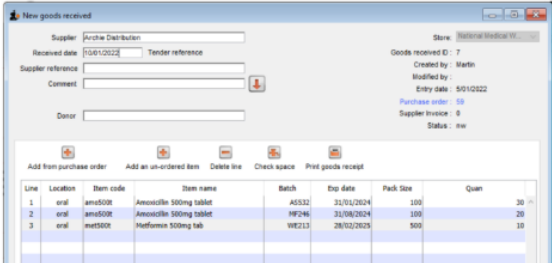
7

8

### Finalise the Goods Receipt

When you are finished specifying details of all received items, you will return to the main goods receiving window.

Review the goods receipt carefully, then check the **Finalise** box and click **OK**.



## 8. Supplier Invoice

Creating a Goods Receipt and Supplier Invoice

4

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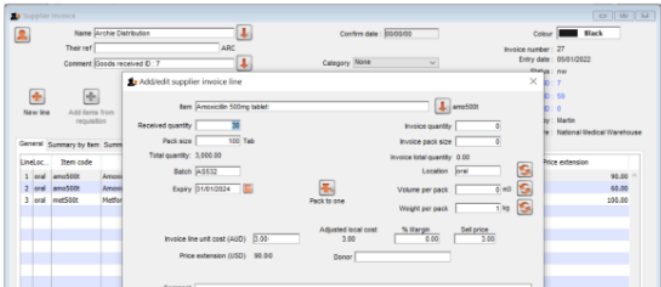
8

9

### Supplier Invoice

A Supplier Invoice automatically opens upon finalising a Goods Receipt.

If necessary, you can edit item details by double clicking on the line. When you are done editing that line, click **OK & Next** to edit the next line, or **OK** to return to the Supplier Invoice.



## 9. Confirm and Finalize the Supplier Invoice

Creating a Goods Receipt and Supplier Invoice

4

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6

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9

### Confirm and Finalise the Supplier Invoice

Items received only get entered into stock when the supplier invoice is confirmed.

Uncheck the **Hold** box.

Click **OK**.

**Confirm** when prompted.

If you are sure you don't want to make any other changes, check the **Finalise** box before clicking **OK**.

## Activity 2: Finalising the Original Purchase Order

**Step 1:** Tell participants its time to finalize the purchase order.

### 1. View the list of purchase Orders

Finalising the Purchase Order

1

2

3

### View the list of Purchase Orders

Click on the **Purchase Orders List** button.

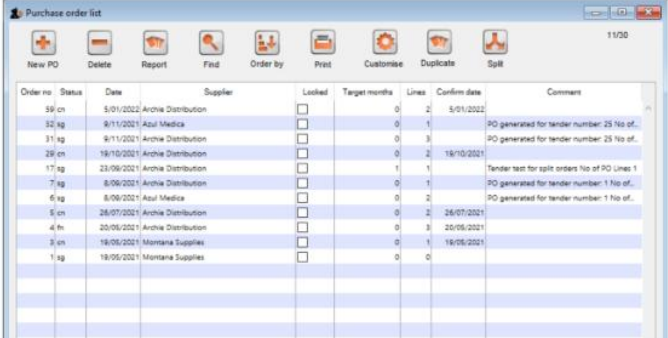
## 2. Select Purchase Order

**Finalising the Purchase Order**

**1**

### Select Purchase Order

Double click on the Purchase Order you wish to finalize.



Order no.	Status	Date	Supplier	Locked	Target months	Lines	Confirm date	Comment
39	on	5/01/2022	Archia Distribution	<input type="checkbox"/>	0	2	5/01/2022	
32	kg	9/11/2021	Asul Medica	<input type="checkbox"/>	0	1		PO generated for tender number 25 No of...
31	kg	9/11/2021	Archia Distribution	<input type="checkbox"/>	0	3		PO generated for tender number 25 No of...
29	on	19/10/2021	Archia Distribution	<input type="checkbox"/>	0	2	19/10/2021	
17	kg	23/06/2021	Archia Distribution	<input type="checkbox"/>	1	1		Tender test for split orders No of PO Lines 1
7	kg	8/06/2021	Archia Distribution	<input type="checkbox"/>	0	1		PO generated for tender number 1 No of...
6	kg	8/06/2021	Asul Medica	<input type="checkbox"/>	0	2		PO generated for tender number 1 No of...
5	on	24/07/2021	Archia Distribution	<input type="checkbox"/>	0	2	24/07/2021	
4	kg	20/06/2021	Archia Distribution	<input type="checkbox"/>	0	3	20/06/2021	
3	on	19/06/2021	Montana Supplies	<input type="checkbox"/>	0	1	19/06/2021	
1	kg	19/06/2021	Montana Supplies	<input type="checkbox"/>	0	0		

## 3. Finalize the Purchase Order

**Finalising the Purchase Order**

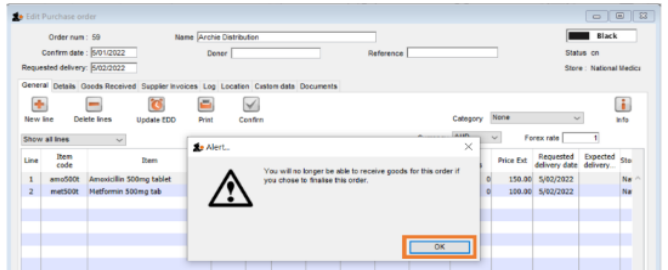
**1**

### Finalise the Purchase Order

Check the **Finalise** order box. Once you have finalised the Purchase Order, you will no longer be able to receive goods for this order.

**2**

Click **OK** when prompted.



**3**

**Step 2:** Appreciate the participants.

## Session 4.15: Managing Outstanding Purchase Order Lines

### Objectives:

By the end of this session, the participants should be able to:

1. Describe how to manage outstanding purchase order

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Managing outstanding purchase order lines	Lecturette/ group demonstration	10 minutes

### Activity 1: Managing outstanding purchase order lines

**Step 1:** In this session we will looking at managing outstanding purchase order lines. Tell participants that we will be looking at step by step.

1. Open outstanding purchase orders

**Managing outstanding purchase order lines**

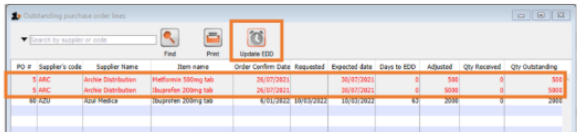
- 1
- 2
- 3
- 4

#### Update EDD

After contacting the supplier, they may give you an updated estimated delivery date which you can enter into mSupply. There are two ways of doing this.

First method:

- Select affected line(s)
- Click the **Update EDD** button
- **Enter Estimated Delivery Date**
- Click **Update**



PO #	Supplier's code	Supplier Name	Item name	Order Confirm Date	Requested	Expected date	Date to EDD	Adjusted	Qty Received	Qty Outstanding
5 ABC		Arche Distribution	Proforma 500mg tab	26/07/2021		30/07/2021	0	500	0	500
5 ABC		Arche Distribution	Proforma 500mg tab	26/07/2021		30/07/2021	0	5000	0	5000
64 120		Alza Madica	Proforma 500mg tab	4/11/2022	10/05/2022	10/05/2022	0	2000	0	2000

## 2. View outstanding purchase order lines

**Managing outstanding purchase order lines**

- 1
- 2
- 3
- 4

### View outstanding purchase order lines

A list of your outstanding purchase order lines is shown.

Each outstanding item is displayed separately, even if they are from the same purchase order. This is because items may be shipped at different times from suppliers and may have different **Expected dates** of arrival. Similarly, **Qty Received** and **Qty Outstanding** are tracked as suppliers may send you partial quantities.

Lines in red show items that have not arrived by their expected date. These items require follow-up.

Lines in black show items that have an expected arrival date in the future. No follow-up is required.

## 3. Update EDD

**Managing outstanding purchase order lines**

- 1
- 2
- 3
- 4

### Update EDD

After contacting the supplier, they may give you an updated estimated delivery date which you can enter into mSupply. There are two ways of doing this.

First method:

- Select affected line(s)
- Click the **Update EDD** button
- **Enter Estimated Delivery Date**
- Click **Update**

## 4. EDD is updated

**Managing outstanding purchase order lines**

- 1
- 2
- 3
- 4

### EDD updated

The expected date column has been updated and the red lines have changed to black.

If the supplier says they are unable to deliver the remaining items, you can finalise the purchase order as shown previously, to clear any outstanding purchase order lines for which you are not expecting stock.

**Step 2:** Close by tell the participants that its good idea to review outstanding purchase order lines on a regular basis to help follow up any later order.

## Session 4.16: Make a Supplier Payment

### Objective:

By the end of this session, the participants should be able to:

1. Explain the process of supplier payment

Time: 15 minutes

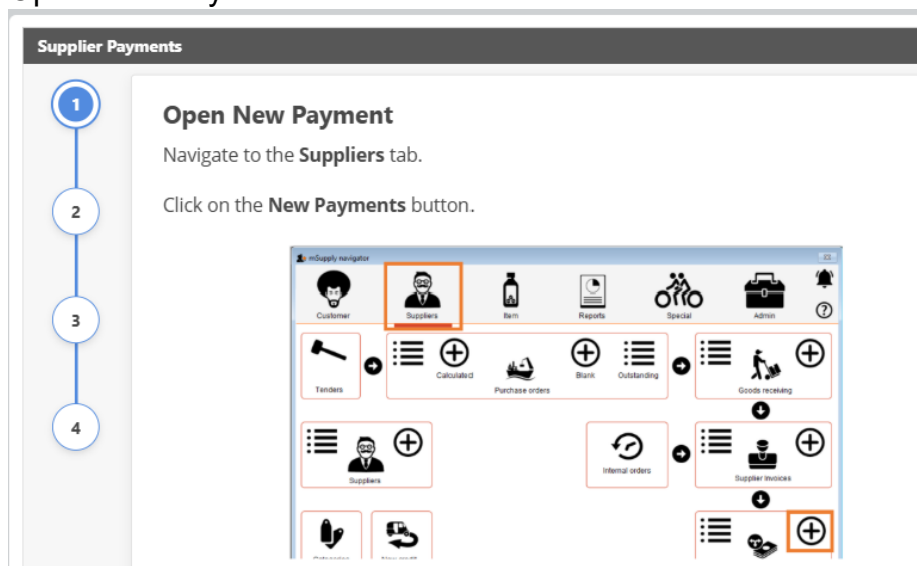
### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Supplier Payments	Lecturette / group demonstration	15 minutes

### Activity 1: Supplier Payments

**Step 1:** Inform participants that we will be looking at to making Supplier Payments. Now lets look at steps.

1. Open New Payment



## 2. Record payment details and select invoice(s)

Supplier Payments

1

2

3

4

### Record payment details and select invoice(s)

Enter the **Name** of the Supplier you are recording a payment to.

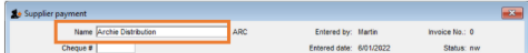
A list of outstanding invoices comes up (if there are multiple which haven't been paid), including the **Total Outstanding** amount.

You can record a Check # and Note if required.

Select the appropriate **Payment currency**.

Enter the **Payment** amount made. Note: mSupply can keep track of partial payments as well.

Click **Distribute** to allocate those funds across the invoice(s). Alternatively, double click a line to enter the payment amount directly to that invoice.



## 3. Complete Supplier payment

Supplier Payments

1

2

3

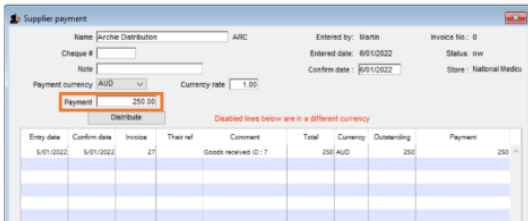
4

### Complete Supplier payment

When you have finished allocating your payment, review your Supplier payment.

If all the details are correct, click **OK**. You can also check the **Print** box if you wish to print a record.

Your Supplier payment is now complete.



Entry date	Confirm date	Invoice	Ther ref	Comment	Total	Currency	Outstanding	Payment
5/01/2022	5/01/2022	27		Goods received (D : 7	250	AUD	250	250

## 4. View past payment

Supplier Payments

1


2

3

4

### View past payments

To view a list of previous Payments, click on the **Payments List** button.



Step 2: Conclude the session by appreciate participants.

## Session 4.17: Return Goods to a Supplier and Receive Credit

### Objectives:

By the end of this session, the participants should be able to:

1. Describe how to create supplier credit from finalized invoice
2. Explain how to create new supplier credit

Time: 30 minutes

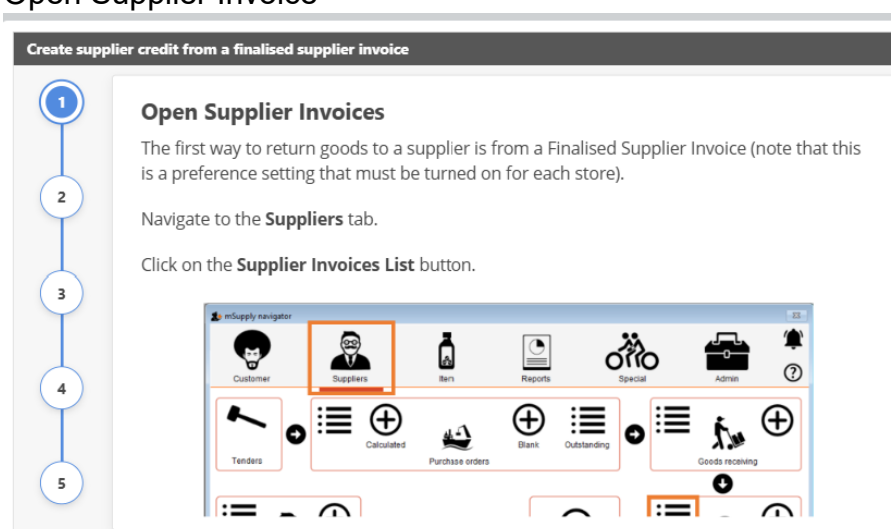
### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Create supplier credit from a finalized supplier Invoice	Lecturette/ group demonstration	15 minutes
2.	Creating New Supplier Credit	Lecturette/ group demonstration	15 minutes
3.			

### Activity 1: Create supplier credit from a finalized supplier Invoice.

**Step 1:** Welcome the participants this session. We will be looking at how to create supplier credit from a finalized supplier invoice. Lets look at the steps

1. Open Supplier Invoice





## 2. Open the relevant invoice

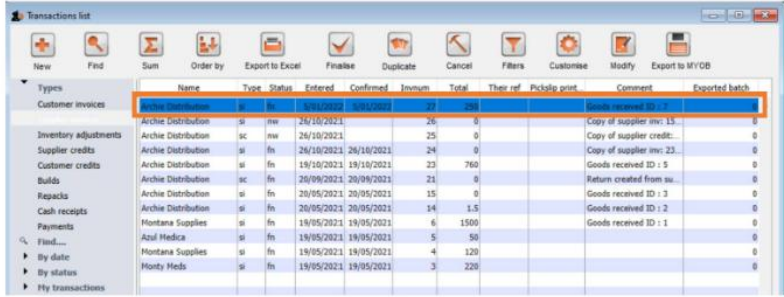
**Create supplier credit from a finalised supplier invoice**

**1**

**Open the relevant invoice**

Double click on the finalised Supplier Invoice which has the stock you want to return.

**2**



Types	Name	Type	Status	Entered	Confirmed	Itemum	Total	Ther ref	Pickup point	Comment	Exported batch
Customer invoices	Archie Distribution	si	fn	19/05/2021	19/05/2021	27	258			Goods received ID : 7	0
Inventory adjustments	Archie Distribution	si	fn	26/10/2021		25	0			Copy of supplier inv: 13	0
Supplier credits	Archie Distribution	si	fn	26/10/2021	26/10/2021	24	0			Copy of supplier credit:	0
Customer credits	Archie Distribution	si	fn	19/10/2021	19/10/2021	23	760			Goods received ID : 9	0
Builds	Archie Distribution	si	fn	20/09/2021	20/09/2021	21	0			Return created from inv:	0
Repacks	Archie Distribution	si	fn	20/05/2021	20/05/2021	15	0			Goods received ID : 3	0
Cash receipts	Archie Distribution	si	fn	20/05/2021	20/05/2021	14	1.5			Goods received ID : 2	0
Payments	Montana Supplies	si	fn	19/05/2021	19/05/2021	6	1500			Goods received ID : 1	0
Find...	Azul Medica	si	fn	19/05/2021	19/05/2021	5	50				0
By date	Montana Supplies	si	fn	19/05/2021	19/05/2021	4	120				0
By status	Monty Meds	si	fn	19/05/2021	19/05/2021	3	220				0
My transactions											

## 3. Select item line(s) to return

**Create supplier credit from a finalised supplier invoice**

**1**

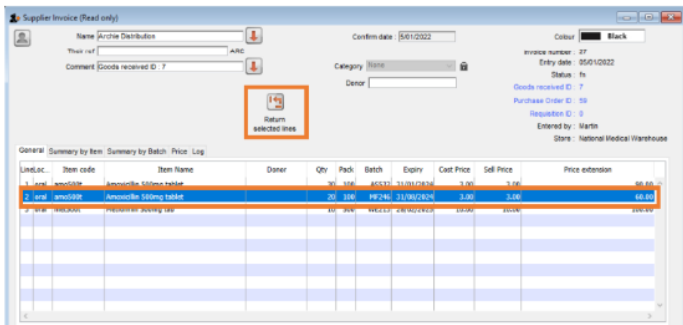
**Select item line(s) to return**

Select the line(s) you wish to return.

**2**

Click the **Return selected lines** button.

**3**



**4**

**5**

## 4. Enter number of packs

**Create supplier credit from a finalised supplier invoice**

**1**

**Enter number of packs to return**

Review the details of the stock you wish to return and ensure it matches the invoice.

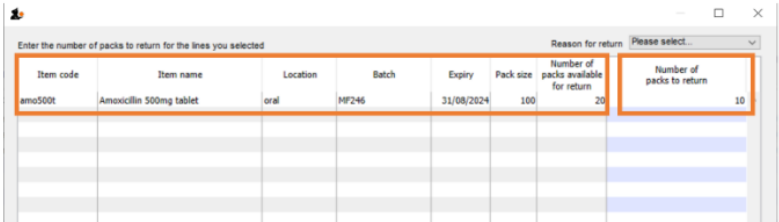
**2**

Enter the **Number of packs to return**, reviewing pack size carefully.

**3**

Click **OK**.

**4**



Item code	Item name	Location	Batch	Expiry	Pack size	Number of packs available for return	Number of packs to return
amo500t	Amoxicillin 500mg tablet	oral	MP246	31/08/2024	100	20	10

## 5. View supplier credit

### Create supplier credit from a finalised supplier invoice

1

2


3

4

5

#### View supplier credit

To view your supplier credit, click on the **Supplier Invoices List** button.



Supplier Invoices

You will see that there is a Supplier Credit (**Type = sc**) for Archie Distribution processed on the 6/01/22. There is also a **Comment** indicating that this is a **Return created from supplier invoice 27**.

You can double click on the Supplier Credit to view it.

## Activity 2: Creating New Supplier Credit

**Step 1:** At first activity we looked at how create supplier credit from a finalized supplier invoice. Now we will be look at to create new supplier credit step by step.

### 1. Open New (Supplier) Credit

### Create a New Supplier Credit

1

2

3

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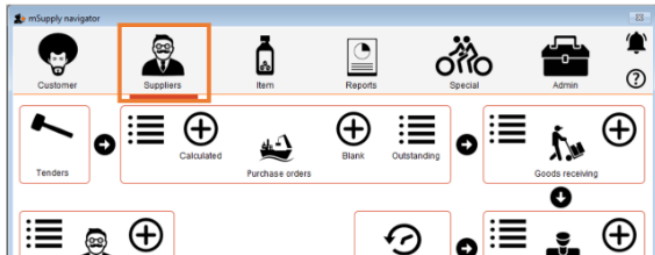
6

#### Open New (Supplier) credit

The second method is to create a new Supplier credit directly.

Navigate to the **Suppliers** tab.

Click the **New credit** button.



### 2. Add supplier details

**Create a New Supplier Credit**

- 1
- 2
- 3
- 4
- 5
- 6

### Add supplier details

Enter the **Name** of the supplier to whom you are returning stock.

Add **Their ref** details if provided, and a **Comment** if needed to help you remember details about the return.

To add item(s) to return, click the **New line** button.

### 3. Search for the item to return

**Create a New Supplier Credit**

- 1
- 2
- 3
- 4
- 5

### Search for the item to return

Search for the item in the usual way, then press **tab**.

Double click on the item you want to return.

### 4. Select the item line and quantity

**Create a New Supplier Credit**

- 1
- 2
- 3
- 4
- 5
- 6

### Select the item line and quantity

Enter the **Line** and **Quantity** of stock you are returning.

You can check the **Supplier** column to ensure you're returning the stock to the original supplier.

Click **OK & Next** to return another item line, or **OK** if you are finished.

Line	Issue	Available	Tot in store	Pack	Hold	Batch	Expiry	Supplier	Donor	Location	Cost Price	Sell
------	-------	-----------	--------------	------	------	-------	--------	----------	-------	----------	------------	------

## 5. Finalise

**Create a New Supplier Credit**

1

2

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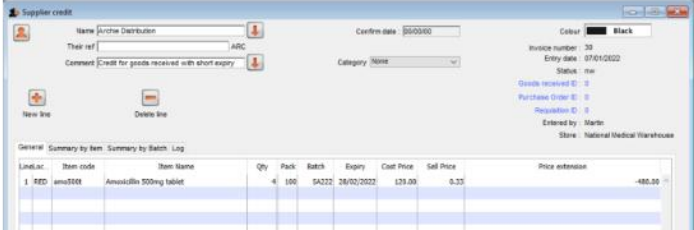
6

### Finalise

When you have finished adding all items to your Supplier Credit, review it carefully to check all the details are correct.

Check the **Finalise** box.

Click **OK**.



Line/loc	Item code	Item Name	Qty	Pack	Batch	Expiry	Cost Price	Sell Price	Price extension
1	amc500	Amoxicillin 500mg tablet	4	100	04222	26/02/2022	125.00	0.33	-480.00

## 6. View supplier credit

**Create a New Supplier Credit**

1

2

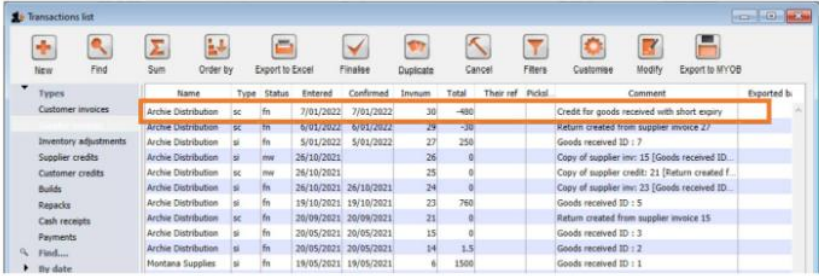
3

4

5

### View supplier credit

As shown in the first method, you can view the Supplier Credit in your Supplier Invoices List.



Type	Name	Type	Status	Entered	Confirmed	Invoice	Total	Ther ref	Picksl	Comment	Exported to
Customer invoices	Archie Distribution	sc	fn	7/01/2022	7/01/2022	30	-480			Credit for goods received with short expiry	
Inventory adjustments	Archie Distribution	sc	fn	6/01/2022	6/01/2022	29	-30			Return created from supplier invoice 27	
Supplier credits	Archie Distribution	sc	fn	5/01/2022	5/01/2022	27	250			Goods received ID : 7	
Customer credits	Archie Distribution	sc	fn	26/10/2021		26	0			Copy of supplier inv: 15 (Goods received ID	
Builds	Archie Distribution	sc	fn	26/10/2021		25	0			Copy of supplier credit: 21 (Return created f	
Repacks	Archie Distribution	sc	fn	26/10/2021	26/10/2021	24	0			Copy of supplier inv: 23 (Goods received ID	
Cash receipts	Archie Distribution	sc	fn	19/10/2021	19/10/2021	23	760			Goods received ID : 5	
Payments	Archie Distribution	sc	fn	20/09/2021	20/09/2021	21	0			Return created from supplier invoice 15	
	Archie Distribution	sc	fn	20/05/2021	20/05/2021	15	0			Goods received ID : 3	
	Archie Distribution	sc	fn	20/05/2021	20/05/2021	14	1.5			Goods received ID : 2	
	Montana Supplies	sc	fn	19/05/2021	19/05/2021	6	1500			Goods received ID : 1	

**Step 2:** At this point, participants know how to return goods to a supplier and receive credit. Appreciate participants for their time.

## Session 4.18: Cash Register

### Objective:

By the end of this session, the participants should be able to:

1. describe the process of cash register transaction

Time: 15 minutes

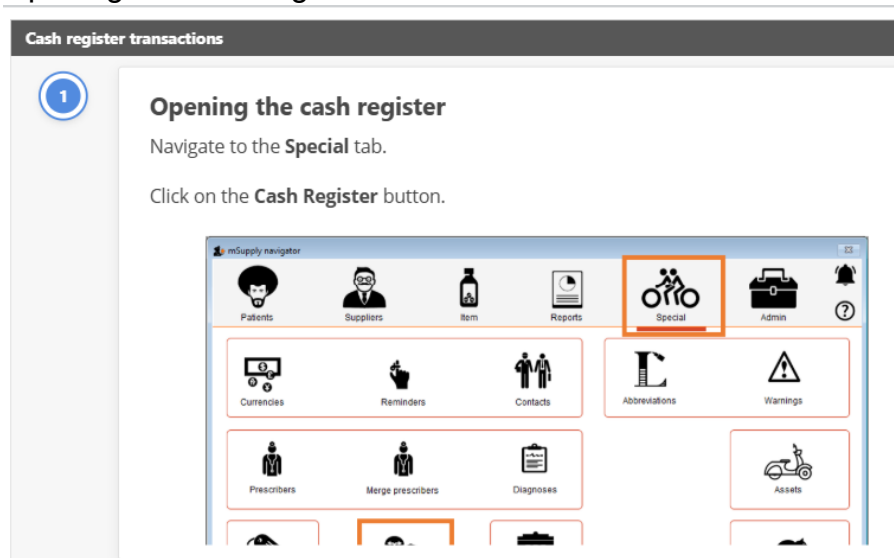
### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Cash register Transaction	Lecturette / group demonstration	15 minutes

### Activity 1: Cash register Transaction

**Step 1:** Tell participants that we will looking at steps of Cash register transaction processes.

1. Opening the cash register



Only finalized cash transactions will appear.

**Cash register transactions**

**Filter**

You can change any filters such as **date range**, **Transaction type** (All transactions, cash payments, cash receipts), or use the **freetext Search function** (you can search by Patient/Facility, or Comment/Reason)

**Current register balance**

If you are using a physical cash register, the **Current register balance** should reflect what you have in your till.

**Cash register transactions**

**Cash transactions table**

For each transaction in the table, you can see:

- **Name** - who the payment was received from or paid to
- **Payment Type (rc = cash receipt i.e. cash paid TO you by**

## Step 2: Lets look at other areas of Cash register transactions.

### 1. Adding or removing cash

1

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**Cash register transactions**

**Adding or removing cash**

You can use this cash register functionality to manually add **cash in** or take **cash out** from the cash register, without it being attached to another transaction. For example, this may be necessary for depositing cash in the bank.

Note: Individual permissions need to be activated in order to make cash transactions within this module.

Click on the **Add transaction** button.

### 2. Add cash transaction details

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**Cash register transactions**

**Add cash transaction details**

Enter the **Name** of the entity you are making a transaction to.

Select the **Transaction type** (Cash in or Cash out).

Enter the **Amount**.

Enter a **Description**.

Click **OK**.

Click **Finalise** when asked to confirm.

### 3. New transaction recorded

**Cash register transactions**

**New transaction recorded**

The new transaction will now appear in your cash register and the **Current register balance** will be updated.

Number	Name	Type	Defined Reason	Comment	Amount	Confirm date
1	Thornbury Warehouse	ps		Payment of invoice(s) 3,4	-1600.5	18/05/2021
1	Chan, John	rc		Receipt for invoice(s) 5	1.1	19/05/2021
2	Thornbury Warehouse	ps		Payment of invoice(s) 6	-83.5	19/05/2021
2	Chan, John	rc		Receipt for invoice(s) 8	9.9	19/05/2021
3	Finance Department	rc		Reimbursement for supplier payments	2000	10/01/2022
3	Central Bank	ps		Weekly bank deposit	-227	10/01/2022

### 4. Printing transaction

**Cash register transactions**

**Printing transactions**

You can export a record of these transactions to Excel. Simply enter any filters you require, then click on the **Print** button.

Number	Name	Type	Defined Reason	Comment	Amount	Confirm date
1	Thornbury Warehouse	ps		Payment of invoice(s) 3,4	-1600.5	18/05/2021
1	Chan, John	rc		Receipt for invoice(s) 5	1.1	19/05/2021
2	Thornbury Warehouse	ps		Payment of invoice(s) 6	-83.5	19/05/2021
2	Chan, John	rc		Receipt for invoice(s) 8	9.9	19/05/2021
3	Finance Department	rc		Reimbursement for supplier payments	2000	10/01/2022
3	Central Bank	ps		Weekly bank deposit	-227	10/01/2022

	A	B	C	D	E	F	G
1	<b>Cash transactions: All transactions, Confirmed 10/01/2021 - 10/01/2022, Search term: @</b>						
2	Store:	Kerang Hospital					
3							
4	Invoice Number	Name	Type	Option	Amount	Confirm date	Comment

## Session 4.19: Ad hoc Items

### Objective:

By the end of this session, the participants should be able to:

1. Explain what is ad hoc item management

Time: 15 minutes

### Session Outline/Activity

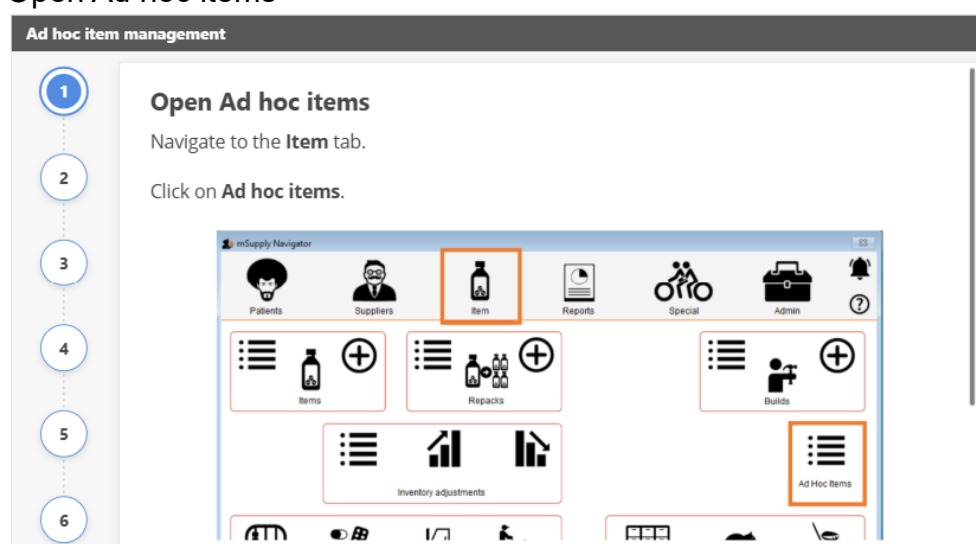
No.	Activity	Facilitation Method	Time Allotted
1.	Ad hoc item Management	Lecturette / group demonstration	15 minutes

#### Activity 1: Ad hoc item Management

**Step 1:** Tell participants that occasionally you may need to order an item one time only, for example a piece of specialist diagnostic laboratory equipment. This is an item that you don't keep in stock and which will never be kept in stock. This items are managed in mSupply as Ad hoc item

**Step 2:** Lets look at step by step.

1. Open Ad hoc items





## 2. Show Ad hoc Items window

1

2

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### Ad hoc item management

#### Show Ad hoc items window

The following window is displayed. From this window you can view Ad Hoc items, add new items, delete items and edit existing items.

The **Show** drop-down list allows you to view Ad Hoc items by their status. Ad Hoc items can have the following status codes:

- **un** - Unassigned: The item has not yet been assigned to a supplier.
- **as** - Assigned but not ordered: This item has been assigned to a supplier, but has not been placed on a Purchase Order.
- **po** - On purchase orders: This item has been added to a purchase order, but the goods have not arrived.
- **fn** - Completed: The item has arrived from a supplier and been invoiced to the customer.

The **Name** field can be used to search for a customer or supplier to whom an item is allocated

## 3. Enter item details

1

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### Ad hoc item management

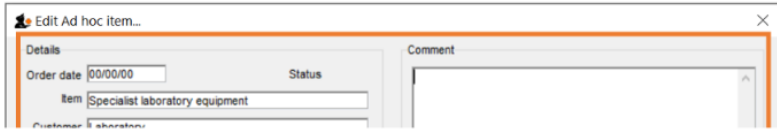
#### Enter item details

Enter the details of the new Ad hoc **item**, including **Customer**, **Supplier**, **Quantity**, **Price** (if known), and **Units**. Add a **Comment** if desired.

Note: a supplier must be input before you are able to add this item to a purchase order so if you don't know the supplier now, you can add it in later.

It's important to add the Customer name who you are ordering the item for so they can be contacted and charged for the item when it arrives.

When you are finished, click **OK**.



## 4. Viewing, editing and deleting Ad hoc items

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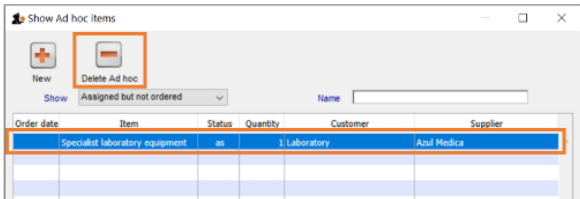
### Ad hoc item management

#### Viewing, editing and deleting Ad Hoc items

Your new item will appear in the list. Note that the status is "**as**" = assigned, which means it still needs to be ordered.

To edit the item, double click it and you will be directed to the previous window where you can make changes.

To delete an item, select it from the list, and click the **Delete Ad hoc** button.



## 5. Adding Ad hoc items to purchase orders

- 1
- 2
- 3
- 4
- 5
- 6

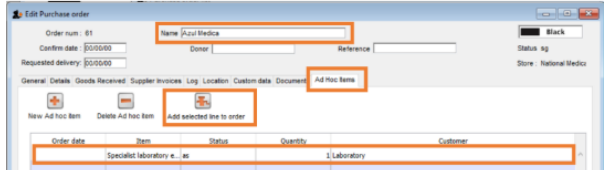
### Adding Ad hoc items to purchase orders

Once you've added an Ad hoc item, you will eventually create a purchase order for this item.

To do so, create a new purchase order as you usually would, entering the Supplier chosen for the item.

Click on the **Ad Hoc Items** tab.

Select the Ad Hoc item(s) you wish to order, then click **Add selected line to order**.



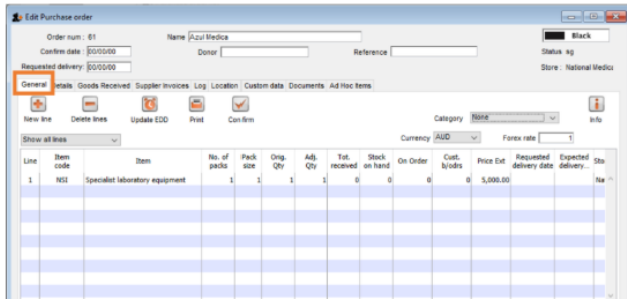
## 6. Viewing ad hoc item in purchase order

- 1
- 2
- 3
- 4
- 5
- 6

### Viewing ad hoc item in purchase order

You will then see your Ad Hoc item added onto the purchase order on the **General** tab.

Continue with your purchase order as you ordinarily would.



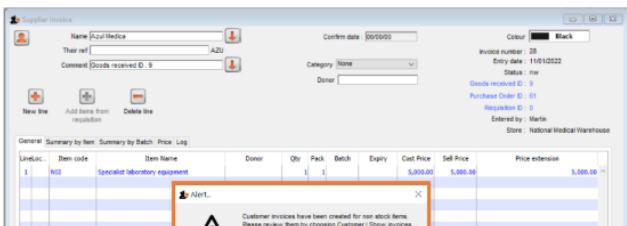
## 7. Receiving ad hoc items

- 1
- 2
- 3
- 4
- 5
- 6
- 7

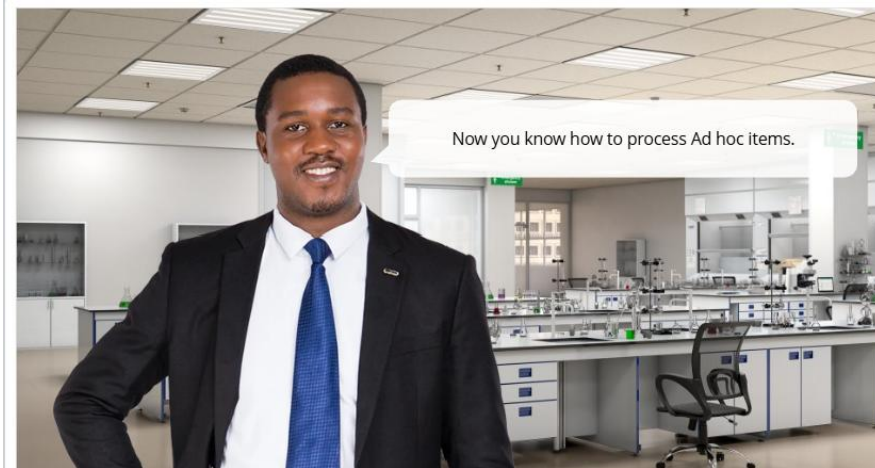
### Receiving ad hoc items

When your supplier sends you the ad hoc item, you process it as you ordinarily would - by creating a goods receipt and supplier invoice.

Once you finalise the supplier invoice, mSupply will automatically create a customer invoice for you to send the item on to the customer. View and process it as you would any other customer invoice.



## Summary



## Session 4.20: Report – Purchase Orders

### Objectives:

By the end of this session, the participants should be able to:

1. Explain the process of generating purchase order report options
2. Describe and demonstrate how to order item report

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Purchase order report options	Lecturette/ group demonstration	15 minutes
2.	Ordered Item Report	Lecturette/ group demonstration	15 minutes
3.	Outstanding purchase order line report	Lecturette/ group demonstration	20 minutes
4.	Purchase order vs goods received report	Lecturette/ group demonstration	15 minutes

### Activity 1: Purchase order report options

**Step 1:** Inform participants that will be looking at how to generate these reports. The trainer should the participants through this process.

1. Introduction

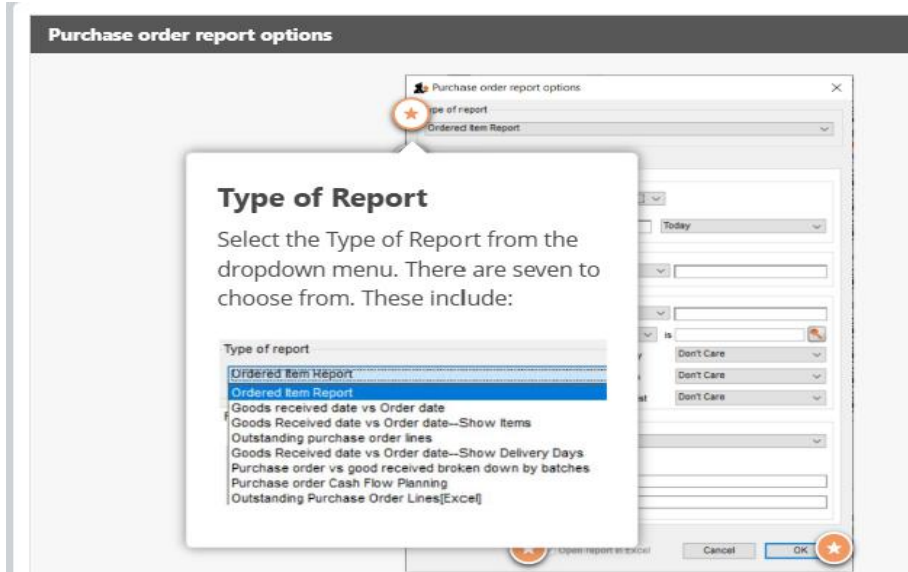
## Introduction

Navigate to the **Reports** tab and click on **Purchase orders**.

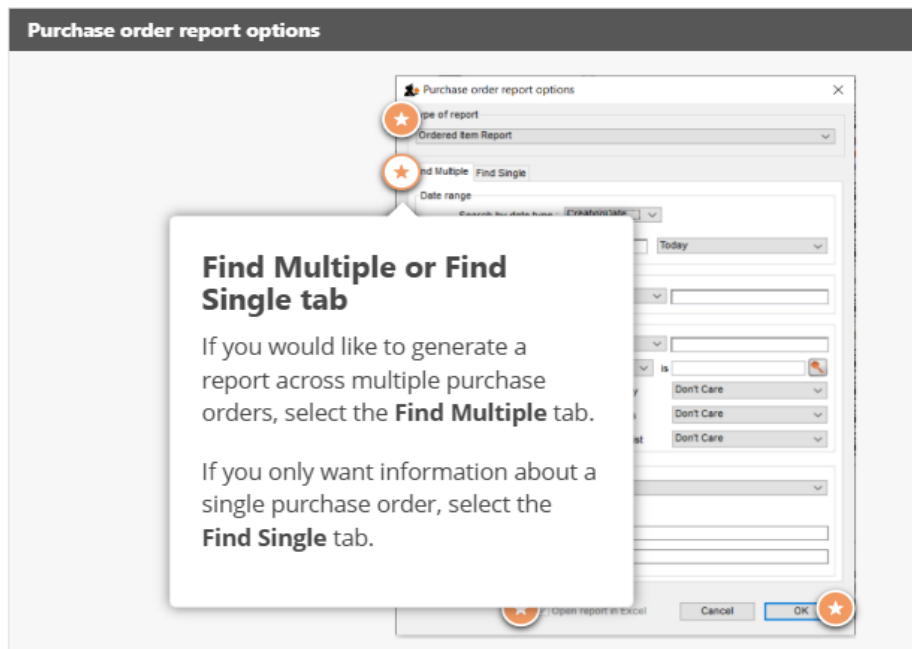


**Step 2:** Lets look at how to generate reports using Purchase order report options as show be low.

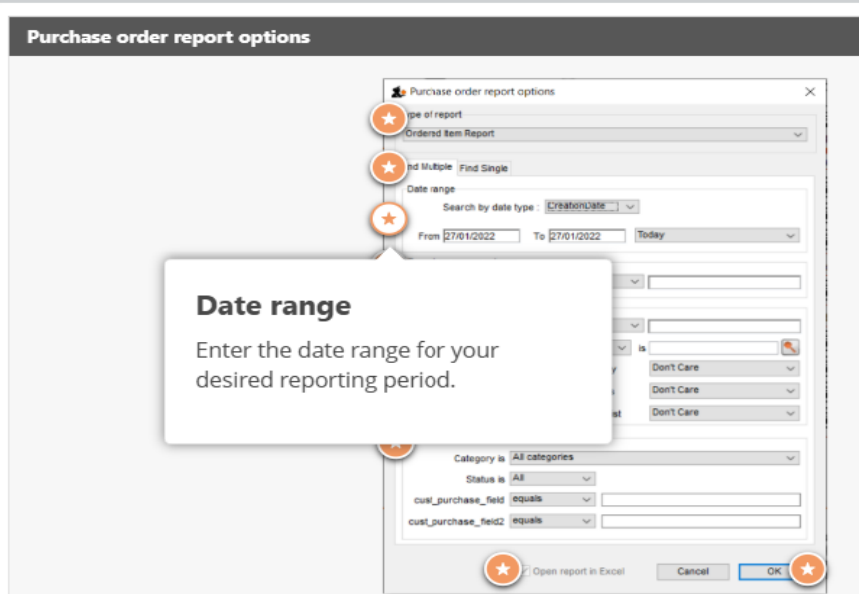
### 1. Type of report slide



## 2. Find Multiple or Find Single tab



## 3. Date range



#### 4. Report on names whose....

The screenshot shows the 'Purchase order report options' dialog box. A vertical sequence of four orange star icons on the left side of the dialog points to the 'Report on names whose...' section. A white callout box with a grey border is positioned over this section, containing the text: **Report on names whose...** and 'You can filter by Suppliers here.' The dialog box itself contains the following fields: 'Type of report' (set to 'Ordered Item Report'), 'Find Multiple' and 'Find Single' buttons, 'Date range' (set to 'Creation date'), 'From' (27/01/2022) and 'To' (27/01/2022) date pickers, 'Today' button, 'Report on names whose...' section with 'Name' and 'contains' dropdowns, 'Status is' (set to 'All'), 'cust\_purchase\_field equals' and 'cust\_purchase\_field2 equals' dropdowns, and 'Open report in Excel', 'Cancel', and 'OK' buttons at the bottom.

#### 5. Report on items whose.....

The screenshot shows the 'Purchase order report options' dialog box. A vertical sequence of four orange star icons on the left side of the dialog points to the 'Report on items whose...' section. A white callout box with a grey border is positioned over this section, containing the text: **Report on items whose...** and 'You can add your typical item filters here.' The dialog box itself contains the following fields: 'Type of report' (set to 'Ordered Item Report'), 'Find Multiple' and 'Find Single' buttons, 'Date range' (set to 'Creation date'), 'From' (27/01/2022) and 'To' (27/01/2022) date pickers, 'Today' button, 'Report on names whose...' section with 'Name' and 'contains' dropdowns, 'Report on items whose...' section with 'Item code' and 'starts with' dropdowns, 'and' and 'Category 1' dropdowns, 'Status is' (set to 'All'), 'cust\_purchase\_field equals' and 'cust\_purchase\_field2 equals' dropdowns, and 'Open report in Excel', 'Cancel', and 'OK' buttons at the bottom.

## 6. Report on Purchase Orders whose

**Purchase order report options**

**Report on Purchase Orders whose...**

Here you can filter by Purchase Order Category (if set up), Status and any other customized fields that have been set up.

and is on Master List

Report on Purchase Orders whose...

Category is All categories

Status is All

cust\_purchase\_field equals

cust\_purchase\_field2 equals

Open report in Excel Cancel OK

## 7. Open report is Excel

**Purchase order report options**

**Open report in Excel**

Tick the **Open report in Excel** checkbox.

type of report Ordered Item Report

Find Multiple Find Single

Date range

Search by date type CREATION DATE

From 27/6/2022 To 27/6/2022 Today

Report on names whose...

Name contains

Report on items whose...

Item code starts with

Open report in Excel Cancel OK

## 8. Ok

**Purchase order report options**

**OK**

Click **OK** when you have entered all your filters.

type of report Ordered Item Report

Find Multiple Find Single

Date range

Search by date type CREATION DATE

From 27/6/2022 To 27/6/2022 Today

Report on names whose...

Name contains

Report on items whose...

Item code starts with

and Category 1

and VEN C

and Depart

and is on Ma

Report on Purchase Orders whose...

Category is All categories

Status is All

cust\_purchase\_field equals

cust\_purchase\_field2 equals

Open report in Excel Cancel OK



## Activity 2: Ordered Item Report

**Step 1:** Tell participants that Ordered Item Report is very helpful way to see everything which has been ordered, what has arrived and what is yet to arrive, and how much it all costs. Lets look at the report.

**Ordered Item Report**

**Report Title**  
Report title including filters and date range applied

**Ordered Item Report**

**General details**  
This shows your store name, PO number and status, and Supplier

**Ordered Item Report**

**Item**  
This shows the Item Code and Item Name

**Ordered Item Report**

**Dates**  
These columns tell you the date the PO was confirmed and sent, the Requested Delivery Date and Estimated Delivery Date

**Ordered Item Report**

**Pack Size**  
This is the Pack Size on order

**Ordered Item Report**

**Packs and Qty Ordered (Orig)**  
These columns tell you the number of packs ordered and total quantity ordered (number of packs x pack size) on the original Purchase Order

**Ordered Item Report**

**Packs and Qty Ordered (Adj)**  
If the purchase order has been edited after it was confirmed, this will show you the number of packs and total quantity on the current (or adjusted) order

**Ordered Item Report**

**Packs and Quantities Received and Outstanding**  
These columns tell you how much stock has already been received, and the quantity outstanding (yet to be received)

**Ordered Item Report**

**Pricing columns part 1**  
These columns give you information about the pricing of the purchase order in the selected currency. The currency and exchange rate are displayed in the **Curr** column.

**Ordered Item Report**

**Pricing columns part 2**  
These are the final prices of the purchase order and value of outstanding stock in the local currency

**Goods Received Date vs Delivery Date Reports**

**Delivery Method**  
This column tells you the Delivery Method, if documented.

**Goods Received Date vs Delivery Date Reports**

**Lead Time (Days)**  
This is the time between confirmation of the purchase order and the Goods Receipt.

## Activity 3: Outstanding purchase order line report

**Step 1:** Inform the participants that the outstanding purchase order lines report can be used to track when stock is expected to arrive, as well as follow up on late deliveries. Lets look at the details of the report template.

**Org and Adj quan order**  
The Original and Adjusted quantity order columns display the total quantity ordered on the Original and Adjusted purchase order (number of packs by pack size).

**Quan received and Outstanding**  
The quan received column displays the quantity received already. The Outstanding column shows you how much you are yet to receive.

**Exp unit price and exp price extension**  
These columns tell you the Expected unit price (i.e. price per pack), and the Expected price extension (price of the full quantity ordered) in the currency of the invoice.

**Price ext (local)**  
This is the total cost of that line in the local currency.

Order Num	Status	Code	Name	Item code	Item	Confirm date	Requested date	Quantity ordered	Quantity received	Outstanding	Exp unit price	Exp price extension	Price ext (local)
5	OK	ABC	ABC Distribution	met500	Metformin 500mg tab	26/07/21	26/07/21	1	0	1	500	500	500
5	OK	ABC	ABC Distribution	ibu200	Ibuprofen 200mg tab	26/07/21	26/07/21	10	0	10	500	5000	5000
60	OK	ADJ	ADJ Atal Medica	ibu200	Ibuprofen 200mg tab	26/07/21	26/07/21	2	0	2	40	80	80
61	OK	ADJ	ADJ Atal Medica	NSI	Specialist laboratory equipment	11/01/22	11/01/22	1	0	1	5000	5000	5000
Grand Total													

## Activity 4: Purchase order vs goods received report

**Step 1:** Let participants know we will be looking at the excel report showing both purchase order vs goods received report.

### 1. Purchase order

**Remaining Incl. Pack**  
This is the remaining quantity still to arrive.

Code	Item	Remaining Incl. Pack	Received Date	Received Batch	Received Expiry	Received Pack	Received Qty
amo500t	Amoxicillin 500mg		0 19/05/2021	AS111	31/01/2022	1	500
amo500t	Amoxicillin 500mg		0 1/07/2021	SA222	28/02/2022	100	5
par500t	Paracetamol 500mg		0 20/05/2021	AA22	28/02/2023	1	500
met500t	Metformin 500mg tab	4	20/05/2021	AA22	28/02/2023	1	500
met500t	Metformin 500mg tab	5	1/07/2021	BS111	31/01/2022	1	50
ibu200t	Ibuprofen 200mg tab	5	28/01/2022	BM432	29/02/2024	1	200
312	amoxicillin 250mg/5mL suspension mL	29	10/10/2021	AM312	28/02/2023	100	10
313	paracetamol 250mg/5mL suspension mL	29	10/10/2021	ACE2411	4/11/2022	100	92
NSI	Specialist laboratory equipment	61	11/01/2022	BA2544	31/01/2023	100	8
ibu200t	Ibuprofen 200mg tab	60	20/01/2022	BA2544	00/00/00	1	1
amo500t	Amoxicillin 500mg tablet	59	10/01/2022	A5532	31/01/2024	100	30
met500t	Metformin 500mg tab	59	10/01/2022	MF246	31/08/2024	100	20
			10/01/2022	WE213	28/02/2025	500	10

## 2. Goods received

Purchase order vs goods received report									
Purchase order vs good received broken down by stock line									
Code	Item								
amo500t	Amoxicillin 500mg tablet								
amo500t	Amoxicillin 500mg tablet								
par500t	Paracetamol 500mg tab								
met500t	Metformin 500mg tab								
met500t	Metformin 500mg tab		5	1	500	25/07/2021			
ibu200t	Ibuprofen 200mg tab		5	100	50	25/07/2021			
312	amoxicillin 250mg/5mL suspension mL		29	100	10	13/10/2021			
313	paracetamol 250mg/5mL suspension mL		29	100	100	13/10/2021			
NSI	Specialist laboratory equipment	Ea	61	1	1	11/01/2022			
ibu200t	Ibuprofen 200mg tab	Tab	60	100	20	6/01/2022			
amo500t	Amoxicillin 500mg tablet	Tab	59	100	50	5/01/2022			
met500t	Metformin 500mg tab	Tab	59	500	10	5/01/2022			

Received Date	Received Batch	Received Expiry	Received Pack	Received Qty
0 19/05/2021	AS111	31/01/2022	1	500
0 1/07/2021	SA222	28/02/2022	100	5
0 20/05/2021	AA22	28/02/2023	1	500
20/05/2021	AA22	28/02/2023	1	500
0 1/07/2021	SA111	31/01/2023	1	50
1/07/2021	BS111	31/01/2022	1	50
300 28/01/2022	BM432	29/02/2024	1	200
0 20/10/2021	AM312	28/02/2023	100	10
0 20/10/2021	ACE2411	4/11/2022	100	92
20/10/2021	BA2544	31/01/2023	100	8
0 11/01/2022		00/00/00	1	1
0 10/01/2022	AS532	31/01/2024	100	30
10/01/2022	MF246	31/08/2024	100	20
0 10/01/2022	WE213	28/02/2025	500	10

### Received columns

These columns show you the date of receipt and break down individual stock lines by batch, expiry, pack size and quantity.

**Step 2:** End this session by appreciating everyone.

## Session 4.21: Reports: Purchases

### Objective:

By the end of this session, the participants should be able to:

1. Demonstrate the process of generating purchase report

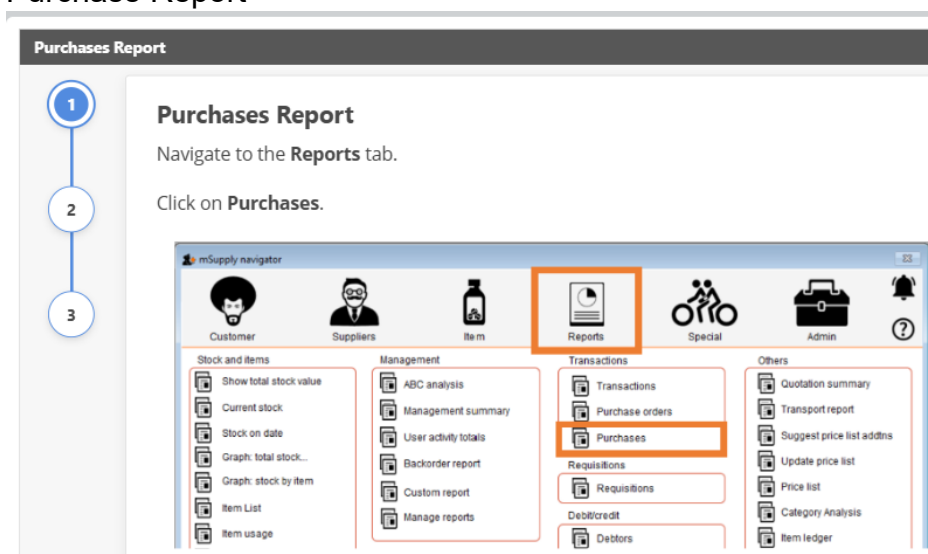
### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Purchase report	Lecturette/ group demonstration	10 minutes

### Activity 1: Purchase report

**Step 1:** The trainer should explain that in a Purchases Report you find all purchasing transactions over a given value within a specified time period. Let's look at the report step by step.

1. Purchase Report



2. Select date range and filters

1

2

3

### Purchases Report

#### Select date range and filters

Enter your desired **Date Range**.

Add the following three filters as necessary (or leave them blank to see all purchases within the date range):

- **Report on names whose...:** you can filter for certain suppliers
- **Report on items whose...:** you can add any of the usual item filters
- **Value greater than...:** enter a minimum value so the report generates all purchases which cost more than the entered amount

After you've entered all your filters, click **OK**.

When prompted, select the **Open in Excel** option and click **OK**.

### 3. View report

1

2

3

### Purchases Report

#### View report

The report will look like this. It tells you the total cost of each line of the purchase order, as well as the grand total of all the purchase orders made.

Invoice Num	Name	Code	Item Name	Quan	Pack Size	Cost Price	Price Exten
3	Monty Meds	MonM	Paracetamol 500mg tab	200	1	1	200
4	Montana Supplies	MON	Amoxicillin 500mg tablet	100	1	1	100
5	Azul Medica	AZU	Amoxicillin 500mg tablet	2	100	20	40
6	Montana Supplies	MON	Amoxicillin 500mg tablet	500	1	1	500
6	Montana Supplies	MON	Metformin 500mg tab	2000	1	0.5	1000
14	Archie Distribution	ARC	Amoxicillin 500mg tablet	5	100	0.3	1.5
23	Archie Distribution	ARC	amoxicillin 250mg/5mL suspension	10	100	6	60
23	Archie Distribution	ARC	paracetamol 250mg/5mL suspension	92	100	7	644
23	Archie Distribution	ARC	paracetamol 250mg/5mL suspension	8	100	7	56
27	Archie Distribution	ARC	Amoxicillin 500mg tablet	30	100	3	90
27	Archie Distribution	ARC	Amoxicillin 500mg tablet	20	100	3	60
27	Archie Distribution	ARC	Metformin 500mg tab	10	500	10	100
32	Archie Distribution	ARC	Metformin 500mg tab	200	1	1.5	300
Grand Total of Price Exten							3151.5

### Step 2: Appreciate everyone.

## Session 4.22: Report – Debit or Credit

### Objective:

By the end of this session, the participants should be able to:

1. Explain and demonstrate the process of generating debit and credit report

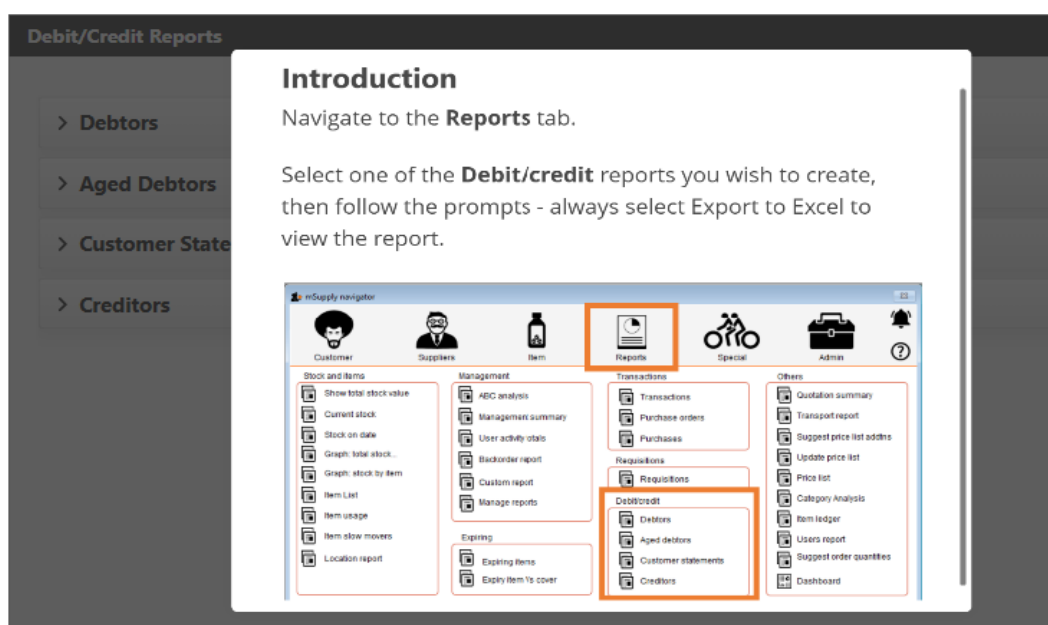
### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Debit/ credit report	Lecturette/ group demonstration	20 minutes

### Activity 1: Debit/Credit Reports

**Step 1:** Welcome the participants to the session. We will be looking at Debit/Credit reports in this session. Lets look at how the report can be generated.

1. Introduction



## 2. Debtors Report (Outstanding invoice)

## Debtors Report (Debt summary)

Debit/Credit Reports					
<p>A <b>Debtors Report</b> shows a list of all outstanding payments owed to you by customers.</p> <p>When creating a Debtors Report, you can choose between two formats:</p> <p>1. <b>Outstanding invoice</b> - where the Debtor's individual invoices and outstanding payments are listed, followed by a grand total at the bottom.</p>					
Debtors listing report National Medical Warehouse					
Name	Code	Overpayment	Invoice Num	Confirm Date	Amount Outstanding
Thornbury Warehouse	TWH	0	10	20/05/2021	30
Thornbury Warehouse	TWH	0	11	20/05/2021	10
Thornbury Warehouse	TWH	0	12	20/05/2021	10
Thornbury Warehouse	TWH	0	13	19/10/2021	25
Thornbury Warehouse	TWH	0	14	19/10/2021	78
Thornbury Warehouse	TWH	0	15	19/10/2021	400
Thornbury Warehouse	TWH	0	16	03/11/2021	30
Thornbury Warehouse	TWH	0	17	05/01/2022	210
Thornbury Warehouse	TWH	0	22	24/01/2022	250
					1043

## Debtor Report (Debt summary)

Debit/Credit Reports		
<p>2. <b>Debt summary</b> - where all Debtor(s) and their outstanding amounts are shown, followed by a grand total at the bottom.</p>		
Debtors listing report National Medical Warehouse		
Name	Code	Amount Outstanding
Thornbury Warehouse	TWH	1043
		1043

## 3. Aged Debtors Report

Debit/Credit Reports							
▼ Aged Debtors							
<p>The Aged Debtors Report shows you the total value of the amount owed to you by a customer, while also showing you how long ago a certain debt was accrued.</p>							
Days since customer invoice (and debt) was created							
Debtor	<45 days	45-60 days	61-90 days	91-120 days	121-180 days	>180 days	total
Thornbury Warehouse	460	0	30	503	0	50	1043
Value of invoice generated and yet to be paid broken down by age of invoice							

## 4. Customer Statements

Debit/Credit Reports				
Customer Statements				
A Customer Statement shows every transaction for that customer and associated value of each transaction.				
It will show you how much of that invoice has been paid, how much is outstanding and the total amount outstanding.				
Statement National Medical Warehouse printed: 31/01/2022				
Thornbury Warehouse				
Date	Inv num	Their ref	Comment	Invoice total Outstanding
20/05/2021	10			30 30
20/05/2021	11			10 10
20/05/2021	12			10 10
19/10/2021	13	From request requisition 26	Invoice from requisition 11; From request requisition 26	25 25
19/10/2021	14			78 78
19/10/2021	15			400 400
3/11/2021	16	From request requisition 27	Invoice from requisition 12; From request requisition 27	30 30
5/01/2022	17			210 210
00/00/00	18	From invoice number: 22	Stock transfer (Return created from supplier invoice 20)	36 -36
00/00/00	19	From invoice number: 23	Stock transfer (Return created from supplier invoice 14)	350 -350
24/01/2022	22	From request requisition 24	Invoice from requisition 10; From request requisition 24	250 250
Total outstanding 657.00				

## 5. Creditors Report

Debit/Credit Reports				
A <b>Creditors</b> Report shows all the amounts YOUR store owes to creditors (or suppliers).				
You can use this to keep track of any outstanding invoices requiring payment.				
Creditors listing				
Name	Code	Invoice Number	Confirm Date	Amount Outstanding
Archie Distribution	ARC	32	28/01/2022	300
			Subtotal	300
Azul Medica	AZU	28	11/01/2022	5000
			Subtotal	5000
Montana Supplies	MON	6	19/05/2021	1500
			Subtotal	1500
Monty Meds	MonM	3	19/05/2021	200
			Subtotal	200
			TOTAL	7000

**Step 2:** Inform participants that the slides above summaries the Debit/Credit reports available in mSupply



## Session 4.23: Report – Quotation Summary

### Objective:

By the end of this session, the participants should be able to:

1. Demonstrate the process of generating quotation summary report

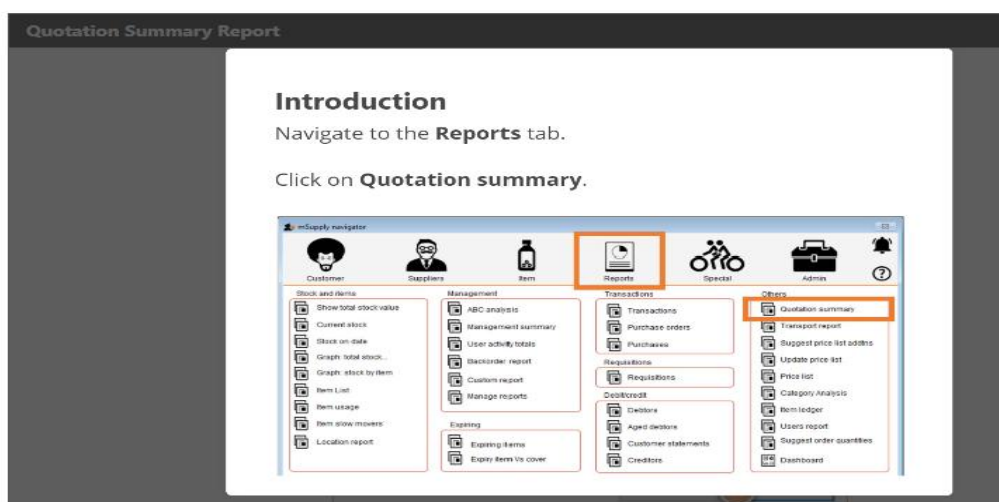
### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Quotation Summary Report	Lecturette/ group demonstration	15 minutes

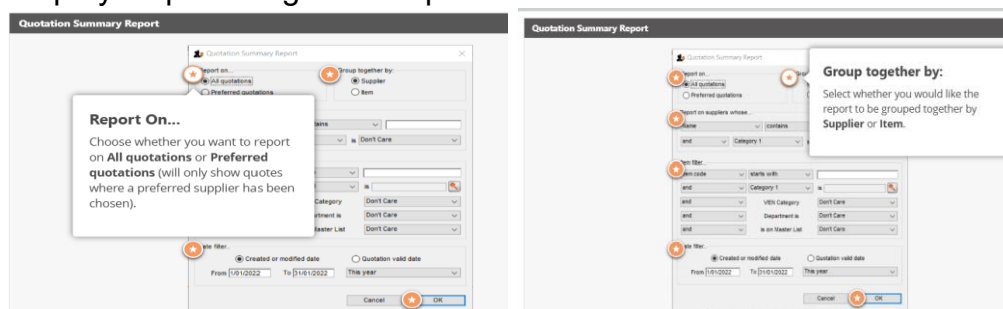
### Activity 1: Quotation Summary Report

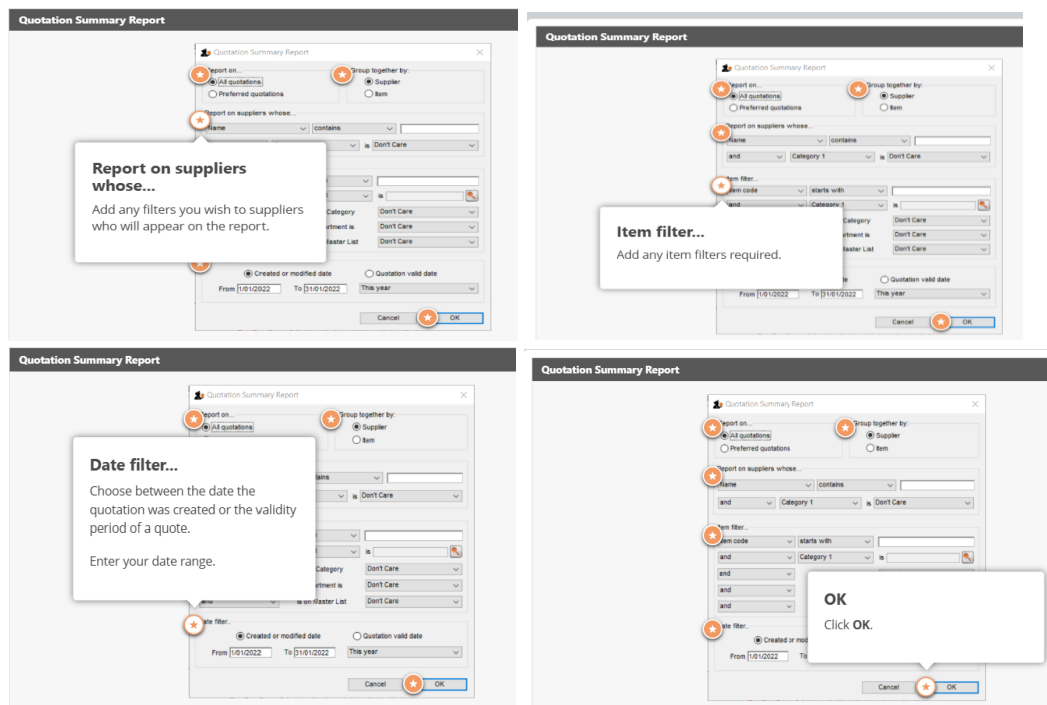
**Step 1:** Inform the participants that you can generate a Quotation Summary Report to review quotation for items by suppliers and we will be looking at the summary report.

1. Introduction



2. Step by step of filling in the report





### 3. Quotation Summary Report

**Quotation Summary Report**

**1**

**Quotation Summary Report**

This is an example of a Quotation summary with all quotations selected and grouped by item.

Item code	Item Name	Supplier Name	Code	Edit Date	Currency	Price	Preferred	Unit Qty	Adj Cost
amo500t	Amoxicillin 500mg tablet	Monty Meds	MonM	09/11/21	AUD	2	True	100	0.01
amo500t		Azul Medica	AZU	14/01/22	USD	0.5	False	1	0.5
amo500t		Archie Distribution	ARC	14/01/22	AUD	0.5	False	1	0.36
amo500t		Azul Medica	AZU	08/11/21	AUD	2	False	1	1.45
amo500t		Montana Supplies	MON	09/11/21	AUD	1.5	False	20	0.05
cefx250i	Ceftriaxone 250mg injection	Monty Meds	MonM	06/12/21	AUD	5	False	10	3.64
cefx250i		Montana Supplies	MON	06/12/21	AUD	0.46	True	1	3.34
cefx250i		Azul Medica	AZU	06/12/21	AUD	6.85	False	10	4.98
ibu200t	Ibuprofen 200mg tab	Monty Meds	MonM	09/11/21	AUD	4	False	100	2.91
ibu200t		Montana Supplies	MON	09/11/21	AUD	0.8	False	10	5.82
ibu200t		Archie Distribution	ARC	14/01/22	AUD	1	False	1	72.8
ibu200t		Azul Medica	AZU	09/11/21	AUD	4	True	100	2.91
met500t	Metformin 500mg tab	Archie Distribution	ARC	09/11/21	AUD	15	False	500	0.02
met500t		Azul Medica	AZU	09/11/21	AUD	2	False	50	0.02
met500t		Monty Meds	MonM	09/11/21	AUD	5	False	90	0.04
met500t		Montana Supplies	MON	09/11/21	AUD	0.8	False	1	0.58
met500t		Azul Medica	AZU	09/11/21	AUD	3	False	20	0.1
par500t	Paracetamol 500mg tab	Montana Supplies	MON	09/11/21	AUD	3	False	20	0.1

**Step 2:** Let the participants also know that the quotation summary report can be useful to help review historical quotations for items as well as reviewing current quotations for future Purchase Orders. Appreciate everyone and close the session.

## Session 4.24: Report – Transport

### Objectives:

By the end of this session, the participants should be able to:

1. Explain and Demonstrate the process of generating transport report

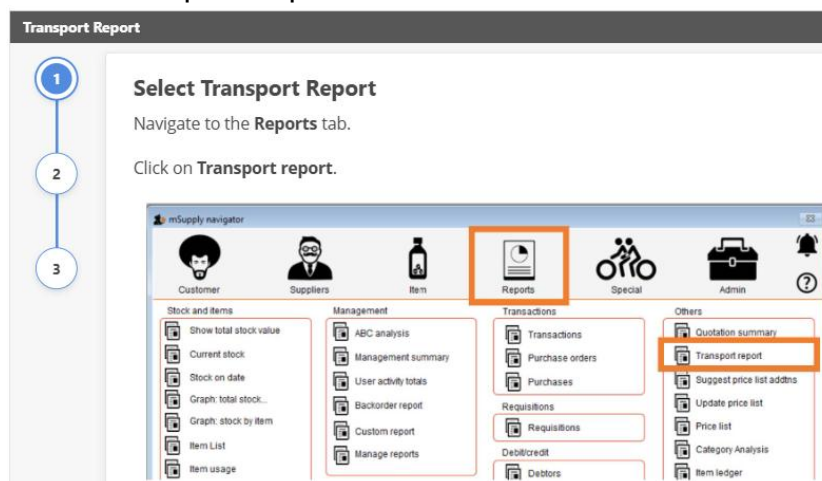
### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Transport Report	Lecturette/ group demonstration	15 minutes

### Activity 1: Transport Report

**Step 1:** The trainer should explain that Transport Report allows you to view information about the transport details for orders you have dispatched from your store. Now, tell participants that we will be looking at how to generate Transport Report.

1. Select Transport Report



2. Add filters

1

2

3

### Transport Report

## Add filters

Enter the **Date range** which you'd like applied to the report.

You can apply certain customer filters via the **Report on names whose...** dropdown boxes.

You can also filter by **Responsible Officer** and/or **Ship Method**.

When you are finished, click **OK**.

Transport report

Date range

From 01/01/2022

To 31/01/2022

Today

Report on names whose...

Name

contains

### 3. View Report

1

2

3

### Transport Report

## View Report

Here you can see a breakdown of the customer invoices, differences between estimated and actual arrival date of orders, and shipping method.

Transport report 01/01/2022 to 31/01/2022										
Code	Name	Confirm Date	Inv Num.	Ship Date	Estimated Arrival Date	Actual Arrival Date	Arrival Day diff.	Responsible Officer	Ship meth	Ship Address1
Lab	Laboratory	11/01/22	21	11/01/22	21/01/22	21/01/22	-4	Martin	Land - road	
TWH	Thornbury Warehouse	24/01/22	22	24/01/22	31/01/22	31/01/22	0	Martin	Ship	

**Step 2:** Tell participants should be easy for all. Appreciate them

## Session 4.25: Report: Price List

### Objective:

By the end of this session, the participants should be able to:

1. Demonstrate the process of generating Price list report

Time: 20 minutes

### Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Generating Price list Report	Lecturette/ group demonstration	15 minutes

### Activity 1: Generating Price list report.

**Step 1:** On behalf of the trainers, the trainer presenting the session should appreciate all participants for their understanding all through this course. Now inform participants that we will be looking at steps for generating the Price list Report.

1. Introduction

The screenshot shows the 'Item details' form in mSupply. The 'Misc' tab is selected in the left-hand menu. The 'Price list' checkbox is checked, and the 'Catalogue pack size' is set to 500. The 'Other names' field is empty.

**Introduction**

You can generate a Price List for items if you have ticked the **On price list** checkbox under the **Misc** tab for each item.

**Item details**

Item name: Amoxicillin 500mg tablet  
Item code: jano500t  
Store: National Medical W...

**Misc**

**Price list**

On price list: ☒  
Catalogue pack size: 500

**Other names**

Account codes for exporting:

Expense account when buying: Cost of goods sold (1000)  
Income account when selling: Income (1000)  
Asset account for stock: Stock (2000)

**SPIS settings**

SPIS code:   
SPIS pack size: 0

Now let's look at steps

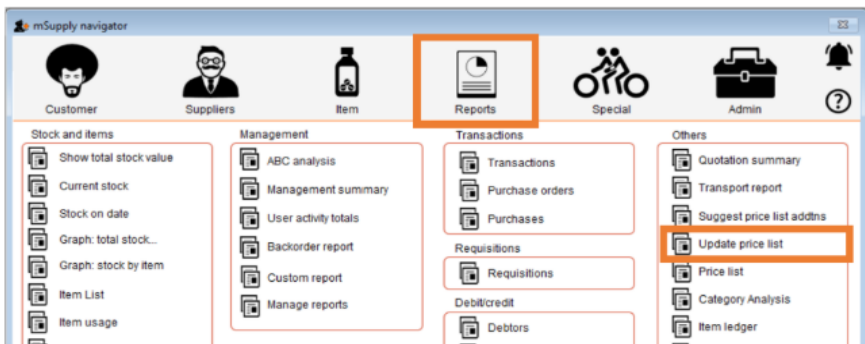
## 1. Update Price List

- 1
- 2
- 3

### Update Price List

Before you can generate a price list, first you need to Update Price List. This will tell mSupply which price to put on the List.

Navigate to the **Reports** tab and click on **Update price list**.




## 2. Select Price list Report

- 1
- 2
- 3

### Select Price List Report

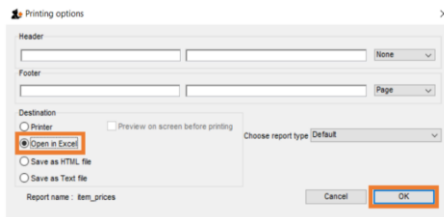
Navigate to the **Reports** tab.

Click on **Price list**.



- 1
- 2
- 3

Select **Open in Excel**, then click **OK**.



## 3. View Report

- 1
- 2
- 3

### View Report

View the **Item Price List** Report.

It will display the **Item name**, **Report Qty** (i.e. Pack Size) and **Indic(ative) Price** (Price per pack).

Item Price List		
item name	Report Qty	Indic Price
amoxicillin 250mg/5mL suspension	100	2
Amoxicillin 500mg tablet	500	5

**Step 2:** Conclude this session by say a big thank to all the participants, admin and others.