



Training Manual on *mSupply* for Healthcare Professionals

Open mSupply Trainer's Guide

MEBS Global Reach

Table of Contents

Introduction to Open mSupply	2
Session 1: What is Open mSupply.....	5
Session 2: Documentation and Release History	7
Session 3: Offline and Sync	10
Session 4: Understanding the Central Server	14
Session 5: Open mSupply Terminology.....	17
Session 6: Packs, Pack Sizes and Units	21
Session 7: Navigating Open mSupply.....	28
Session 8: Catalogue	30
Session 9: View Stock.....	35
Session 10: Inventory Management	41
Session 11: Stocktakes	43
Session 12: Location.....	54
Session 13: Repacks	58
Session 14: Inventory Adjustment, Log and Ledgers	62
Session 15: The Order Cycle.....	69
Session 16: Internal Orders.....	74
Session 17: Requisition	90
Session 18: Outbound Shipment	103
Session 19: Inbound Shipment	117
Session 20: Returns.....	125

Introduction to Open mSupply

Step 1: Welcome the participants to the course. Proceed to read out the overall learning objectives. Alternatively, call a volunteer to read out the objectives.

Overall Learning Objectives: By the end of this course, participants will:

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

Step 2: Ask if any of the participants have used mSupply before now. Tell one or at most two persons to share very briefly their experience with mSupply. Appreciate all participants for their contributions

Step 3: Trainer should read and explain the description of the course as stated below in the box

Trainer's Note:

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

Step 4: Ask participants to suggest who they think the target audience for Open mSupply training might be, based on what they have learned so far. Take a few responses, then add any that are not mentioned from the list below:

Target Audience

1. Storekeepers, pharmacists, and inventory managers using Open mSupply at facility or district level
2. Supervisors and logistics coordinators responsible for order approvals and shipment handling
3. Staff transitioning from manual systems to digital LMIS platforms
4. Anyone seeking foundational understanding before undertaking advanced Open mSupply modules

Step 5: Ask participants if they have any questions. If there are questions, treat them interactively.

Step 6: Please inform the participants that Open mSupply is continuously evolving, and new features or design updates may be introduced in each release. As a result, some visuals, workflows, or menu labels in this course may not exactly match what you see in your system.

Step 7: Tell participants that to know and be sure they are using the latest platform, they should take note of the following:

- Confirm the version of Open mSupply you're using.
- Compare it with the latest release notes at: msupply.foundation/open-msupply/releases.
- Because the platform is always improving, some parts of this course may become outdated over time. For the most up-to-date guidance, always refer to the official documentation at: docs.msupply.foundation.

Step 8: Tell participants that Before we close this session, please take about five minutes to look over the session outline in the course structure. This is just a quick overview to help you see what's ahead. Don't worry—we'll go through each session step by step in much more detail as the course progresses.

Course Structure

This course is organized into the following sessions:

S/N	Session Title	Time Allotted
1	What is Open mSupply?	30 minutes
2	Documentation and Release History	30 minutes
3	Offline and Sync	40 minutes
4	Understanding the Central Server	35 minutes
5	Open mSupply Terminology	40 minutes
6	Packs, Pack Sizes and Units	70 minutes
7	Navigating Open mSupply	50 minutes
8	Catalogue	65 minutes
9	View Stock	80 minutes
10	Inventory Management	20 minutes
11	Stocktakes	225 minutes
12	Location	60 minutes
13	Repacks	35 minutes
14	Inventory Adjustment, Log and Ledger	75 minutes
15	The Order Cycle	35 minutes

16	Internal Order	100 minutes
17	Requisition	120 minutes
18	Outbound Shipment	70 minutes
19	Inbound Shipment	55 minutes
20	Returns	35 minutes

Session 1: What is Open mSupply

Session objectives:

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

1. Explain the meaning of eLMIS and its uses.
2. Describe Open mSupply and its purpose.
3. Highlight why data should be recorded in Open mSupply.
4. Apply knowledge of Open mSupply to real-world scenarios.

Time: 30 minutes

Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	What is an eLMIS	Lecturette	5 minutes
2.	What is Open mSupply	Lecturette	10 minutes
3.	Why should data be recorded on Open mSupply	Lecturette	5 minutes
4.	Practical Scenario	Case Discussion	5 minutes
5.	Activity Scenario	Lecturette/Quiz	5 minutes

Activity 1: What is an eLMIS?

Step 1: Introduce the session by asking participants what is the full meaning of eLMIS and its uses. Take a few responses from the participants. The trainer should use the point below to explain further.

- eLMIS stands for Electronic Logistics Management Information System.
- It is a digital platform designed to manage and streamline healthcare supply chain operations, providing real-time visibility into inventory, orders, and distribution.

Step 2: Ask participants if they have any questions, and treat questions interactively.

Step 3: Trainer should inform participants that we will be looking at typical uses of an eLMIS. Ask participants if any of them can mention some uses of eLMIS, take a few responses and mention the following: that eLMIS is typically used to

- Track and manage stock levels of medicines, vaccines, and other health commodities.
- Generate reports to support decision-making and forecasting.
- Facilitate the ordering and distribution processes to ensure the right products are delivered to the right locations.

Activity 2: What is Open mSupply

Step 1: Begin by asking the participants if any of them can explain what they understand by Open mSupply. Take a few comments and proceed by informing them that: ***Open mSupply is an open-source eLMIS designed to support healthcare supply chains in low-resource settings.***

Step 2: Ask participants if they have any questions. If there are, allow fellow participants to attempt to answer the questions before you conclude.

Step 3: Tell participants that we shall be looking at the key purposes of Open mSupply.

Step 4: Explain that the **key purposes of Open mSupply are to ensure:**

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

Step 5: For better understanding, tell participants, we will also look at the **Key Features of Open mSupply**. Use the box below as a guide.

Trainer's note:

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

- Inventory Management: Easily track stock levels, batches, and expiry dates to make sure medical supplies are used efficiently.
- Order Management handle orders, requisitions, and shipments smoothly and without hassle.

Activity 3: Why should data be recorded on Open mSupply

Step 1: Inform participants that in every supply chain system, **data is a must, and accurate, timely data entry into Open mSupply is essential for managing the healthcare supply chain effectively.**

Step 2: Also, let the participants know that recording data ensures that **inventory, orders, and distribution are tracked in real time, enabling better decision-making and resource management.**

Step 3: Ask participants if they have any questions. Please ensure you emphasize on the importance of accurate and timely data entry into Open mSupply.

Step 4: Tell participants that we will now look at the **Benefits of Recording Data in Open mSupply**. Write the following on the flip chart and explain each point using the box below as a guide.

1. Improves Stock Accuracy: Real-time tracking helps avoid stockouts and overstocking by providing an up-to-date view of inventory levels
2. Reduces Waste: Monitoring expiry dates ensures that supplies are used efficiently, minimizing waste and reducing costs.
3. Supports Better Planning: Reliable data helps forecast needs, plan procurement, and schedule distributions more effectively.

4. **Enhances Accountability:** Detailed records make it easier to track orders, shipments, and usage, ensuring transparency and accountability.
5. **Increases Efficiency:** Automated processes reduce manual effort, saving time and improving accuracy.

Step 5: If there are no questions, tell them “**why it matters**”. Conclude by appreciating participants for their time. Inform them that we will be looking at scenarios next.

Activity 4: Practical Scenario

Case Example:

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

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

As a result, the following issues arise:

- **Stock Imbalance:** Since the shipment wasn’t recorded, Open mSupply shows lower stock levels than what is actually in storage. As a result, extra vaccines are ordered unnecessarily, leading to overstocking.
- **Missed Expiry Alerts:** Without the expiry dates entered, Open mSupply cannot show at-risk vaccines. Some of the doses expire unnoticed and are discovered only when trying to be used, leading to wastage.
- **Distribution Delays:** Late orders and running out of stock result in clinics being unable to access vaccines on time. This delays immunization programs and puts patients at risk of preventable diseases.
- **Lack of Accountability:** During an audit, discrepancies between the physical stock and system records raise concerns. The health center struggles to explain the overstock and wasted vaccines, damaging trust and accountability.

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

Activity 5: Activity Scenario

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

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

Session 2: Documentation and Release History

Session objectives:

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

1. Access and navigate the Open mSupply Documentation Website.
2. Locate version history to track system updates.

Time: 30 minutes

Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Open mSupply Documentation Website	Lecturette/Live demonstration	15 minutes
2.	Open mSupply Release Version History	Lecturette/Live demonstration	15 minutes

Activity 1 Open mSupply Documentation Website

Step 1: Welcome back the participants and inform them that, before we continue further into this course, we will take a moment to familiarize ourselves with some important resources that will guide us throughout the course.

Step 2: Ask the participants if they know about or have used the Open mSupply Documentation Website before. Take a few seconds for participants to respond.

Step 3: Show participants the website (<https://docs.msupply.foundation/>), write the website on the flip chart and inform them that this website is your go-to guide for learning how to use Open mSupply and other mSupply products. It includes detailed:

1. Instructions.
2. Tutorials.
3. Technical documentation that will help you understand how to operate the system and make the most out of its features.
4. Step-by-step guides and troubleshooting tips to assist you as you navigate through Open mSupply.

Step 4: Ask the participants to open the website and get familiar with it. Trainers should support participants and move round the hall to ensure they are all on the same page.

Activity 2: Open mSupply Release Version History

Step 1: Tell participants that it is important to stay up to date with the latest changes in Open mSupply. The Open mSupply Release Version History website is where you will find updates, bug fixes and new feature releases for the system.

Step 2: Write the websites on the flip chart and allow participants to open the two links below to see version details and updates, that show what has changed in each release.

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

Step 3: Inform the participants that Open mSupply Release Version History is very important in the course. As you proceed in this course you might notice some of the content like screenshots, clickthroughs, or videos, doesn't exactly match what you see in the software when using it live. This happens when course materials reference a different version of Open mSupply than the one you are using. Please allow participants to reflect on this for a few seconds and ask if they have any questions.

Step 4: Conclude this session by informing the participants that this is an evolving document and we need to be sure we are using the updated one.

Session 3: Offline and Sync

Session objectives:

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

1. Explain what synchronization (“Sync”) means in Open mSupply.
2. Describe what happens when working offline.
3. Identify the advantages and disadvantages of offline use.
4. Explain why syncing is important for supply chain accuracy.
5. Demonstrate understanding of sync through practical examples and a short quiz.

Time: 40 minutes

Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	What is Sync	Lecturette	10 minutes
2.	What Happens When You Are Offline	Lecturette	10 minutes
3.	Why Syncing is Important and Syncing in Action	Lecturette	15 minutes
4.	Activity Scenarios	Quiz	5 minutes

Trainers note:

- Open mSupply is regularly updated, so if the content here differs from what you see in the system, please refer to the [Open mSupply documentation](#) for the most current information.
- Open mSupply is a powerful tool designed to support healthcare operations at all levels, from local clinics to larger hospitals, ensuring the right products are available in the right quantities at the right time.
- The system works by streamlining the processes of inventory management, procurement, and order fulfillment, providing real-time visibility into stock levels, order status, and distribution.

Activity 1: What is Sync?

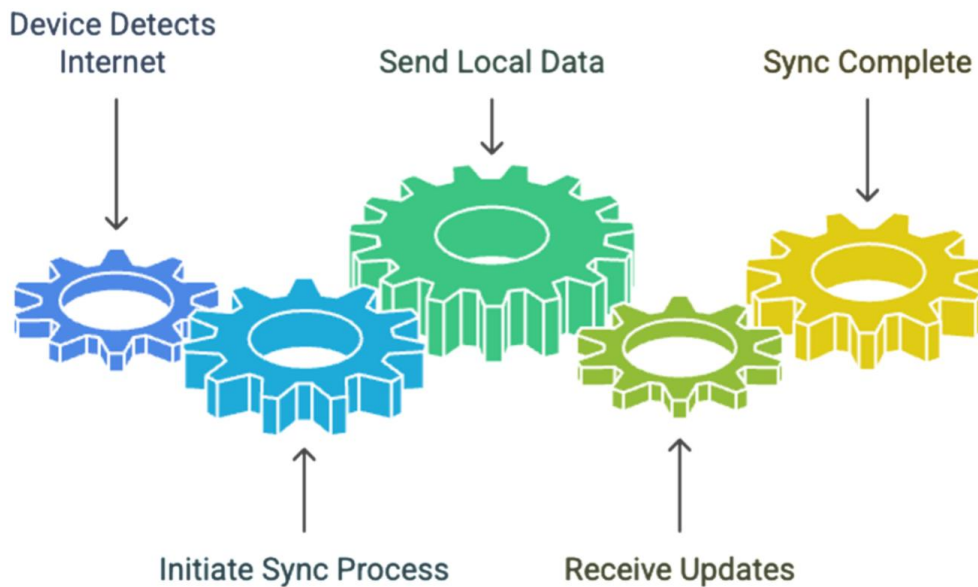
Step 1: Welcome the participants to this session. Ask them what is the full meaning of Sync. Ensure they all understand that Sync is short for Synchronisation, which is the process that keeps your local device and the central system up to date with each other.

Step 2: Ask participants if they can give examples (e.g. NHLMIS). Take a few and appreciate them

Step 3: Inform participants that Synchronisation involves two key actions as state below.

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

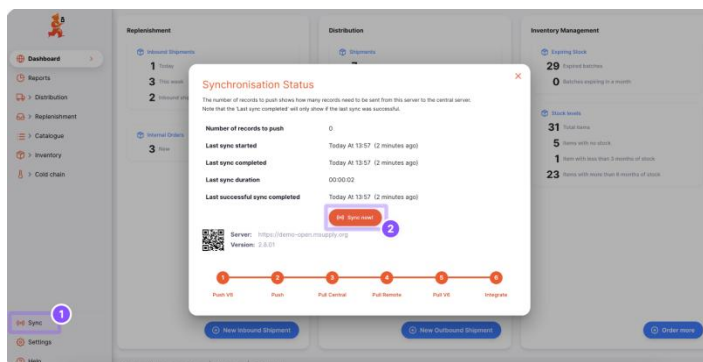
Step 4: Show participants the pictorial illustration of Synchronisation as show below.



Device detects internet → Sync starts → Local data is sent →
Updates received → Sync complete

Step 5: Also inform the participants that Open mSupply also gives you control over Sync in the following ways:

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



Activity 2: What Happens When You Are Offline

Step 1: Participants should know that when you use your device when there is no internet especially in some rural or remote areas, the system is built to continue to work even when you are offline.

Step 2: inform the participants you can still do the following:

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

Ask them if they have any questions before your proceed.

Step 3: Let participants know that there are some disadvantages of using your system offline. These include:

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

Trainer's note:

Tell participants that all of this information is saved on your device, and you won't lose your work just because the internet is unavailable.

Activity 3: Why Syncing Is Important and Syncing in Action

Step 1: Start by asking participants to tell you some importance of Syncing. Take two to three responses, and then explain further using the points below.

- It allows your supervisors and central-level planners to see what's happening at your facility.
- It keeps your stock levels accurate across the system.
- It lets you receive updates that were entered at other locations.
- It ensures your data is safely backed up in case your device is lost or damaged.

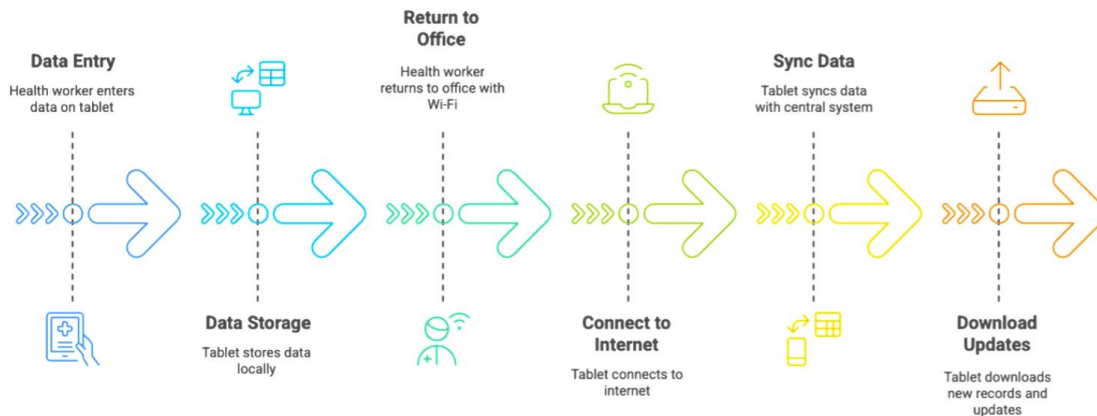
Trainer's note:

Tell participants that even if you are offline for several days, your device will keep saving your work and then sync everything when it next connects.

Step 2: Now lets look at Syncing in Action step by step and in pictorial.

- A health worker is using a tablet to enter dispensing data while working in a rural clinic with no internet.
- The tablet stores all this information in its local storage.
- Later in the day, the health worker returns to a central office with Wi-Fi.
- The tablet connects to the internet and syncs the saved data with the central system.

- At the same time, it downloads any new updates or records created elsewhere.



This is a summary flow chart of the described scenario above.

Step 3: Tell participants that we will be doing a quiz. Underline the correct answers for both question 1 and question 2.

Question 1

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

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

Question 2

You're working in a rural clinic using Open mSupply on a tablet. After 2 days offline, you reconnect to the internet. You've recorded several transactions during that time. What should you do next?

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

Step 4: Conclude this session by telling the participants that Syncing ensures that the latest information is available across your store/facility, central teams, and other connected facilities, supporting accurate, real-time decisions across the supply chain.

Session 4: Understanding the Central Server

Session objectives:

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

1. Define what a database is and explain its role in Open mSupply.
2. Describe what a central server is and its importance in data management.
3. Identify where central servers may be located.
4. Explain why centralised data matters for planning and decision-making.
5. Demonstrate understanding of the central server through a short quiz.

Time: 35 minutes

Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	What is a Database?	Lecturette, group discussion	10 minutes
2.	What is a Central Server?	Lecturette, group discussion	10 minutes
3.	Why Centralised Data Matters	Lecturette, group discussion	10 minutes
4.	Activity Scenarios	Quiz	5 minutes

Activity 1: What is a Database

Step 1: Ask participants to attempt to define Database. Take few definitions from them and summarize by telling them that Database is a digital structure that stores all your data. This can include things such as:

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

Trainer's Note

The participants should know that each device like their tablet or facility computer, has its own local database where adding and editing data are done offline.

Activity 2: What is a Central Server

Step 1: Inform participants that we will be looking at the Central Server. Explain to participants that a Central server is a Powerful computer that stores the main copy of the data from all devices across the system. This is where data from multiple facilities are brought together. Syncing ensures the data from each local database is sent to the central server.

Step 2: Ask participants if they know where their Central Server is located. The responses should be as follows depending on organization and country.

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

Step 3: Explain to participants that the Central Server collects data from all facilities using the system which allows the Central level users to:

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

Step 4: Appreciate the participants for their cooperation.

Activity 3: Why Centralised Data Matters and Quiz

Step 1: Inform the participants that Centralised Data Matters because it is **syncing data from all facilities into one place and it gives decision-makers a full picture of what is happening in the system.**

Examples:

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

Trainer's Note

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

Step 2: Tell participants that we will be doing some quiz. They should select the right answer to each question.

Question 1

Why is syncing to the central server important?

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

Question 2

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

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

Session 5: Open mSupply Terminology

Session objectives:

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

1. Define key Open mSupply concepts and terms.
2. Relate new Open mSupply terms to legacy mSupply terminology.
3. Correctly identify the meaning of specific terms through practice exercises

Time: 40 minutes

Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Introduction to Key Concepts	Lecturette, group discussion	20 minutes
2.	Review of Open mSupply vs legacy mSupply terminology	Lecturette, group discussion	15 minutes
3.	Quiz	Individual exercise	5 minutes

Trainer's Note:

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

Activity 1: Introduction to Key Concepts

Step 1: The participants will need to learn some key concepts and terms. Take them through the following:

Term	Definition
Items	Products managed in mSupply (includes medicines, consumables, equipment, laboratory/radiology items).
Stores	Departments within a facility who may or may not manage inventory independently from a larger entity. For example, there may be two stores in a hospital - one inpatient pharmacy store and one outpatient pharmacy store.
Locations	Specific place inside a store where items are kept. For example, a large central warehouse may have many locations (e.g., A.02.04, B.01.03), while small stores may have less (e.g., Room 1, Room 2). Items may also be stored without assigning a location (i.e., just stored alphabetically).
Suppliers	Suppliers are facilities that a store orders or receives stock from. Suppliers may be external (e.g., private drug companies or

	wholesalers) or internal (e.g., central medical store, provincial warehouses).
Donors	External entities who pay for donated stock (e.g., UNICEF, USAID). No donor is entered when the government or medical store is paying in a normal financial transaction. When the donor is recorded, you can track donated items through the supply chain and run donor transaction reports and stocktakes.
Customers	Recipients of items, excluding patients. This includes health centres, hospitals, wards, private clinics and pharmacies, outreach services and any other entity that an mSupply store issues stock to.
Patients	Individuals who receive items from a prescription. When a store uses mSupply in dispensary mode, patients receive unique ID numbers and we can track their prescription history, allergies, payment history, insurers, and notes.
Prescribers	Prescribers are authorised medical professionals who provide prescriptions to patients, which we can dispense in mSupply. Prescribers may include doctors, nurses and other authorised individuals.
Users	Users are the people using mSupply (you!). Each user has their own password and set of permissions (which can vary from store to store). System logs track everything that users do in mSupply.

Step 2: Ask them if they have any questions. If yes, treat interactively.

Activity 2: Open mSupply Terminology

Trainer's Note:

Ask participants to tell you what they understand by Legacy mSupply and how it differs from Open mSupply. Allow a few responses and explain to them that Legacy mSupply refers to the older/original version of the mSupply software that has been in use for many years before the development of Open mSupply (the newer, open-source, web-based version).

Step 1: Ask for volunteers to read each of the terms in the table which shows the changes in naming conventions between Open mSupply and Legacy mSupply.

Open mSupply Term	Legacy mSupply Term	Definition
Outbound Shipment	Customer Invoice	Refers to the creation of a supply of goods sent to a particular customer (e.g., a healthcare facility).
Inbound Shipment	Supplier Invoice	Refers to the receipt of goods supplied by a particular supplier.

Requisition	Customer Requisitions	An order placed by a customer (e.g., a healthcare facility) requesting the supply of goods.
Internal Order	Internal Order	A request made to a supplier for stock needed by a facility or organization.
Supplier Return	Supplier Credit	Refers to returning goods to a supplier, typically due to damage, expiry, or incorrect delivery.
Customer Return	Customer Credit	The process of receiving returned goods from a customer (facility), often due to issues like overstock or expiry.

Step 2: After all the volunteers have finished reading each term, ask participants if any of the terms need more clarification. If none, tell them that we will be doing a quick quiz.

Step 3: Participants should tick the correct definition to the term.

1. Locations

- a) Specific places inside a store where items are stored.
- b) Where the store gets stock from (internal or external).
- c) Other facilities or services that receive stock from your store.
- d) Products managed in the system (e.g. medicines, supplies, equipment).
- e) Inventory-managed areas or departments within a facility.
- f) Organisations that fund donated stock (e.g. UNICEF).

2. Stores

- a) Specific places inside a store where items are stored.
- b) Where the store gets stock from (internal or external).
- c) Other facilities or services that receive stock from your store.
- d) Products managed in the system (e.g. medicines, supplies, equipment).
- e) Inventory-managed areas or departments within a facility.
- f) Organisations that fund donated stock (e.g. UNICEF).

3. Donors

- a) Specific places inside a store where items are stored.
- b) Where the store gets stock from (internal or external).
- c) Other facilities or services that receive stock from your store.
- d) Products managed in the system (e.g. medicines, supplies, equipment).

- e) Inventory-managed areas or departments within a facility.
- f) Organisations that fund donated stock (e.g. UNICEF).

4. Items

- a) Specific places inside a store where items are stored.
- b) Where the store gets stock from (internal or external).
- c) Other facilities or services that receive stock from your store.
- d) Products managed in the system (e.g. medicines, supplies, equipment).
- e) Inventory-managed areas or departments within a facility.
- f) Organisations that fund donated stock (e.g. UNICEF).

5. Suppliers

- a) Specific places inside a store where items are stored.
- b) Where the store gets stock from (internal or external).
- c) Other facilities or services that receive stock from your store.
- d) Products managed in the system (e.g. medicines, supplies, equipment).
- e) Inventory-managed areas or departments within a facility.
- f) Organisations that fund donated stock (e.g. UNICEF).

6. Customers

- a) Specific places inside a store where items are stored.
- b) Where the store gets stock from (internal or external).
- c) Other facilities or services that receive stock from your store.
- d) Products managed in the system (e.g. medicines, supplies, equipment).
- e) Inventory-managed areas or departments within a facility.
- f) Organisations that fund donated stock (e.g. UNICEF).

Trainer's Note:

Reiterate to participants that these terms are the language of Open mSupply. Once you master them, navigating the system becomes much easier.

Step 4: Appreciate participants for their cooperation.

Session 6: Packs, Pack Sizes and Units

Session objectives:

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

1. Define a pack, pack size, and unit in Open mSupply.
2. Differentiate between packs and units in stock management.
3. Explain how pack size impacts ordering, dispensing, and reporting.
4. Apply the correct entry methods for warehouses versus dispensaries.
5. Avoid common errors in recording pack and unit sizes.

Time: 90 minutes

Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	What is a Pack	Lecturette	10 minutes
2.	What is Pack size	Lecturette, group discussion	10 minutes
3.	Key Difference between Pack vs. Unit	Lecturette, group discussion	10 minutes
4.	Quiz	Individual exercise	5 minutes
5.	Special Case: Dispensaries Sending Individual Units	Lecturette/ group demonstration	10 minutes
6.	Entering Stock for Unit-Based Dispensing	Lecturette/ group demonstration	10 minutes
7.	Comparing Warehouse vs. Dispensary	Lecturette/ group demonstration	30 minutes
8.	Quiz 2	Individual exercise	5 minutes

Activity 1: What is a pack

Step 1: Ask for a volunteer to define Pack. Take a few definitions but ensure the correct definition is what is accepted.

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

- A **bottle** of tablets
- A **box** of syringes
- A **blister strip** of capsules
- A **vial** or **ampoule**
- A **carton** with multiple smaller containers



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

Activity 2: What is Pack Size

Step 1: Tell participants there is a difference between Pack and Pack Size. Pack Size is the number of individual units inside one pack. It answers: “If I open this pack, how many tablets/syringes/strips are inside?”

Step 2. Participants should know some additional details regarding pack size as shown below. The detail is essential when converting between stock levels, order quantities and patient dispensing.

- If a bottle has 100 tablets, the **pack size** is 100.
- If a carton contains 10 vials, the **pack size** is 10.

If you have 1 bottle of paracetamol with 100 tablets inside:

- **Pack** = 1 bottle
- **Pack Size** = 100 tablets
- **Total tablets in stock** = 1 bottle × 100 tablets = **100 tablets**

Activity 3: Key Difference between Pack vs. Unit

Step 1. Inform participants that there is a key difference between Pack and Unit. Use the table to explain the differences.

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

Step 2: Conclude this session by giving the participants a Quiz:

Activity 4: Instruction: Match each item with its correct pack quantity and pack size.

1. 5 boxes of amoxicillin (10 tablets per box)
 - a) Pack Quantity = 8, Pack Size = 1
 - b) Pack Quantity = 1, Pack Size = 200
 - c) Pack Quantity = 6, Pack Size = 1
 - d) Pack Quantity = 20, Pack Size = 144
 - e) Pack Quantity = 5, Pack Size = 10
2. 8 tubes of cream (30g per tube)
 - a) Pack Quantity = 8, Pack Size = 1
 - b) Pack Quantity = 1, Pack Size = 200
 - c) Pack Quantity = 6, Pack Size = 1
 - d) Pack Quantity = 20, Pack Size = 144
 - e) Pack Quantity = 5, Pack Size = 10
3. 6 bottles of paracetamol suspension (each 60mL)
 - a) Pack Quantity = 8, Pack Size = 1
 - b) Pack Quantity = 1, Pack Size = 200
 - c) Pack Quantity = 6, Pack Size = 1
 - d) Pack Quantity = 20, Pack Size = 144
 - e) Pack Quantity = 5, Pack Size = 10

4. 20 boxes of male condoms (each box has 144)

- a) Pack Quantity = 8, Pack Size = 1
- b) Pack Quantity = 1, Pack Size = 200
- c) Pack Quantity = 6, Pack Size = 1
- d) Pack Quantity = 20, Pack Size = 144
- e) Pack Quantity = 5, Pack Size = 10

5. 1 box of gloves (contains 200 gloves)

- a) Pack Quantity = 8, Pack Size = 1
- b) Pack Quantity = 1, Pack Size = 200
- c) Pack Quantity = 6, Pack Size = 1
- d) Pack Quantity = 20, Pack Size = 144
- e) Pack Quantity = 5, Pack Size = 10

Activity 5: Special Case: Dispensaries Sending Individual Units

Step 1: The trainer should take the participants through by explaining that in a **warehouse**, stock is managed in bulk — physical containers like boxes, cartons, or bottles. These are referred to as packs, and the system tracks how many packs you have, each containing a fixed number of units (known as the pack size).

Examples:

- *1 bottle of 1000 tablets* → Pack Size = 1,000
- *1 box of 100 gloves* → Pack Size = 100
- *1 carton of 20 vials* → Pack Size = 20

Step 2: Ask participants if they have any questions before you proceed.

Step 3: Then explain that in dispensary you may not be handing patients full bottles or cartons. Instead, you will be giving them exactly what they need for treatment:

- 20 **tablets** for a 5-day course
- 3 **syringes** for injections
- 15 **mL** of oral suspension

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

Trainer's Note:

Explain to participants that some dispensaries may give out only full packs, like whole bottles or boxes, so they track stock in packs instead of single units. You should always check how your dispensary handles stock before entering it into the system.

Activity 6: Entering Stock for Unit-Based Dispensing

Step 1: We will be studying Entering Stock for Unit-Based Dispensing. Use the table below to explain.

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

Activity 7: Comparing Warehouse vs. Dispensary

Step 1: Inform participants we will be comparing Warehouse entry vs Dispensary entry. The table below shows the different entries. Discuss the table interactively with the class.

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

Why It Matters

Step 1: Explain that Entries in Units or Packs are the most common areas where users make mistakes, and that those errors can have a real consequences in the following ways.

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

Step 2: Please emphasize the following before concluding the session:

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

Trainer's Note:

Remind participants that getting this right ensures that your inventory reflects what you physically have and what you safely give to patients.

Step 3: Tell participants to complete the quiz by ticking the correct answer for each question.

Questions

1. What is the significance of getting pack sizes right?
 - a) It determines the price of products.
 - b) It is not important for stock management.
 - c) It only matters for labeling.
 - d) It affects stock visibility and ordering.
2. If you have 1 bottle containing 100 tablets, what is the total stock in the system?
 - a) 1,000 tablets
 - b) 10 vials
 - c) 100 tablets
 - d) 100 bottles
3. What could happen if pack sizes are incorrectly entered in the system?
 - a) Over- or under-stocking may occur.
 - b) It will only affect pricing.
 - c) It won't impact anything.
 - d) Ordering errors can happen.
4. Which of the following statements about pack size is true?

- a) Pack size indicates how many individual units are within one pack.
 - b) Pack size refers to the total number of items in stock.
5. How should stock be managed differently in a warehouse compared to a dispensary?
- a) Dispensaries focus on bulk orders, warehouses on precise counts.
 - b) Warehouses do not track individual items, while dispensaries do.
 - c) Both manage stock only in packs.
 - d) Warehouses manage stock in bulk, dispensaries manage by individual units.

Trainer's Note:

Conclude the session by reiterating to participants that Packs, pack sizes, and units are the building blocks of inventory management in Open mSupply. Getting them right ensures accuracy, avoids stock-outs, and supports patient safety.

Step 4: Appreciate participants for their cooperation and end the session.

Session 7: Navigating Open mSupply

Session objectives:

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

1. Log in to Open mSupply.
2. Navigate through the main features of the platform.
3. Use the Help button to access user guides, support, and feedback tools.
4. Apply support resources for troubleshooting.

Time: 50 minutes

Session Outline/Activity

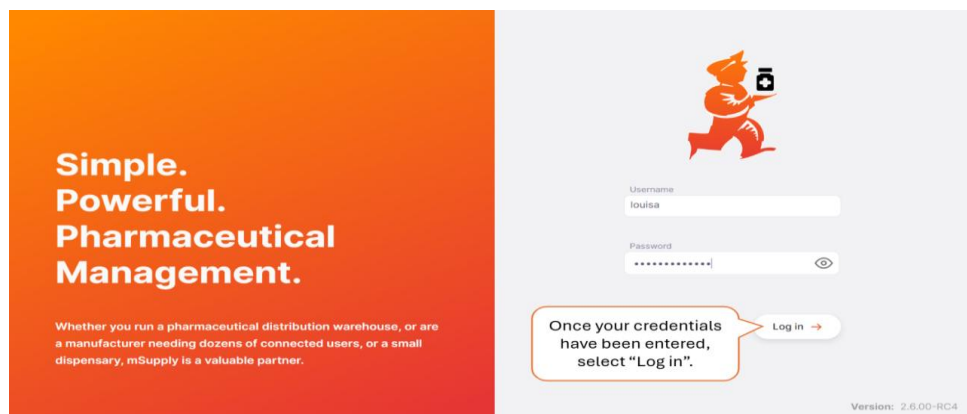
No.	Activity	Facilitation Method	Time Allotted
1.	Open mSupply Navigation Demo	Lecturette/Live demonstration	20 MINUTES
2.	Using the “Help” Button	Lecturette/Live demonstration	20 MINUTES

Activity 1: Open mSupply Navigation Demo

Trainer’s Note:

Introduce this section by saying: Now that we understand some basic terms, let’s take a quick look at what Open mSupply looks like and how we can navigate through the system.

Step 1: Tell participants that we will learn how to navigate platform. Inform participants that once you open the platform, enter your email address and password as requested and select Log in.

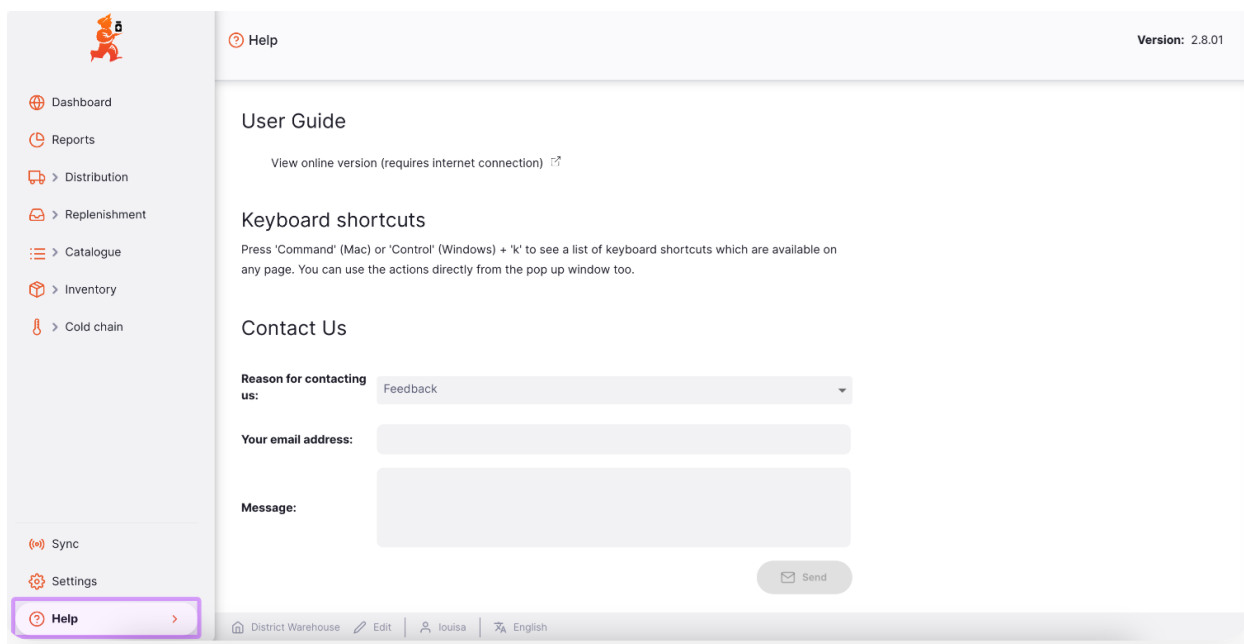


Step 2: Inform them we are diving into the platform.

Activity 2 : Using the Help Button

Step 1: Inform participants that the Help button in Open mSupply gives you quick access to support tools and resources when you need assistance.

Step 2: Show participants the screenshot below- where to see the Help button.



Step 3: Lets look at what you can do with the “Help” page:

View the User Guide

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

Contact Support or Give Feedback

- Use the contact form to:
 - Send Feedback about your experience using the system
 - Request Support if you run into a technical issue
- To use this form, select your reason, enter your email address, type your message, and then **Send**.

Step 4: Appreciate participants and end the session.

Session 8: Catalogue

Session objectives:

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

1. Define what a Catalogue is in Open mSupply.
2. Explain why the Catalogue is important for inventory and order management.
3. Identify and describe the key components of the Catalogue (Assets, Items, Item Ledger, Master Lists).
4. Use the Catalogue to monitor and manage stock and assets.
5. Apply Catalogue knowledge in daily facility operations.

Time: 65 minutes

Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Introduction	Lecturette/ live demonstration	15 minutes
2.	Why is the Catalogue Important	Lecturette/ live demonstration	50 minutes

Activity 1: Introduction:

Step 1: Ask for a volunteer to explain “Catalogue”. Take few comments. Use the information in the box to explain better to participants.

The **Catalogue** serves as a central list of all items, assets, and master lists available to your store. It provides an organized and comprehensive view of resources, enabling you to access available items easily.

The Catalogue is essential for managing your store’s inventory and ensuring that only authorized and listed items are ordered, used, or tracked.

Step 2: Show participants the screenshot below to understand that Catalogue includes the ability to view Assets, Items and Master Lists for your store.

Code	Name	Unit	SOH	AMC	MOS
030063	Acetylsalicylic Acid 100mg tabs	Tablet	73,253	414.33...	176.8...
030062	Acetylsalicylic Acid 300mg tabs	Tablet	2,863	1,276.83...	2.24...
030453	Amoxicillin 250mg tabs	Tab	33,397	80.83...	413.16...
050457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/100ml	Bottle	4,686	51.83...	90.41...
201116	Bandage W.O.W. 15cm wide x 5m roll	Roll	658	83.5	788...
047288	Benzyl penicillin Injection 1000000 Unit	Vial	1,559	59.25	26.31...
047290	Benzyl penicillin Injection 500,000 Unit (300 mg)	Vial	5,394	131.33...	41.07...
031661	Captopril scored 25mg tabs	Tablet	1,700	266.67...	6.37...
clinda001	Clindamycin 500mg Injection	Ampoule	1,240	32.83...	37.77...
COPIUD	Copper IUD	Each	0	0	0
dtpvax	DTP Vaccine, 10 doses	Vial	214	1.67...	128.4
dtphbhib	DTP-HEPB-HIB (Penta) Vaccine, 1 dose	Vial	141	1.83...	76.91...

Showing 1-29 of 29
Rows per page: 500

Activity 2: Why is the Catalogue Important

Step 1: Explain that the Catalogue is crucial for several reasons:

1. **Centralized Inventory Management:** It keeps track of all products and assets, ensuring that your store's stock is well-organized and that you always know what you have in inventory.
2. **Order Management:** If an item is listed in the Catalogue, it can be easily ordered, tracked, and replenished as needed. If an item is missing from the Catalogue, you won't be able to order or manage it directly, making it necessary to request the Central Store to add it to the master list.
3. **Efficiency and Accuracy:** By relying on a single, centralized Catalogue, Open mSupply helps streamline processes, reduce errors, and ensure consistent product information across all stores.

Step 2: We will be looking at the other components of the Catalogue. The trainer should ask questions and allow group interaction.

Assets:

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

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

The Assets section is used to monitor and audit cold chain equipment performance and inventory. You can filter and export the asset list as needed.

**Items:**

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

- Medicines
- Vaccines
- Consumables
- Devices and other supplies

You can also see:

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

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

Item Ledger:

- The Item Ledger is a detailed log that records every transaction for a specific item — including receipts, issues, repacks, and stock adjustments.
- It's your complete view of how the item has moved through your store over time- like the item's audit trail.

Items / Acetylsalicylic Acid 300mg tabs

Stock on Hand: 2,863 Units | Average Monthly Consumption: 1,276.83 Units | Months of Stock: 2.24 Months

General | Master Lists | **Ledger**

Type	Invoice Number	Date	Time	Name	Status	Expiry	Batch	Pack Size	Number of packs	Unit Qty	Balance	Pack cost price	Pack sell price	Total
Repack	7	28/06/2025	00:55	Repack	Verified	30/06/2018	1234	30	1	30	2863	\$0.00	\$0.00	\$
Repack	7	28/06/2025	00:55	Repack	Verified	30/06/2018	1234	1	30	-30	2833	\$0.00	\$0.00	\$
Inbound Shipments	18	23/06/2025	16:51	District Dispensary	Delivered	30/06/2018	1234	1	30	30	2863	\$0.00	\$0.00	\$
Inbound Shipments	5	23/06/2025	12:54	Health Clinic	Delivered	31/12/2025	vfd352	1	20	20	2833	\$0.12	\$0.12	\$
Inbound Shipments	5	23/06/2025	12:54	Health Clinic	Delivered	31/12/2028	ser123	1	10	10	2813	\$0.12	\$0.12	\$
Outbound Shipments	36	24/03/2025	21:46	Eastern Village	Shipped	30/04/2028	fre3502	1	300	-300	2803	\$0.08	\$0.08	\$
Inbound Shipments	16	24/03/2025	21:43	Global Donor	Delivered	30/04/2028	fre3502	1	1000	1000	3103	\$0.08	\$0.08	\$
Inventory Reduction	5	04/03/2025	09:42	Inventory Adjustment	Verified	31/12/2020	def142	100	80	-8000	2103	\$1.70	\$1.40	\$
Outbound Shipments	35	03/03/2025	15:38	Eastern Village	Shipped	31/12/2030	gry444	1	80	-80	10103	\$0.25	\$0.25	\$
Outbound Shipments	35	03/03/2025	15:38	Eastern Village	Shipped	31/12/2029	awe132	100	100	-10000	10183	\$1.20	\$1.00	\$
Outbound Shipments	35	03/03/2025	15:38	Eastern Village	Shipped	31/12/2028	gth563	1	90	-90	20183	\$0.25	\$0.25	\$
Outbound Shipments	35	03/03/2025	15:38	Eastern Village	Shipped	31/12/2028	ser123	1	2	-2	20273	\$0.12	\$0.12	\$

Showing 1-35 of 35 | Rows per page: 500

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

Why It Matters: (Item Ledger)

The ledger allows you to:

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

Trainer's Note:

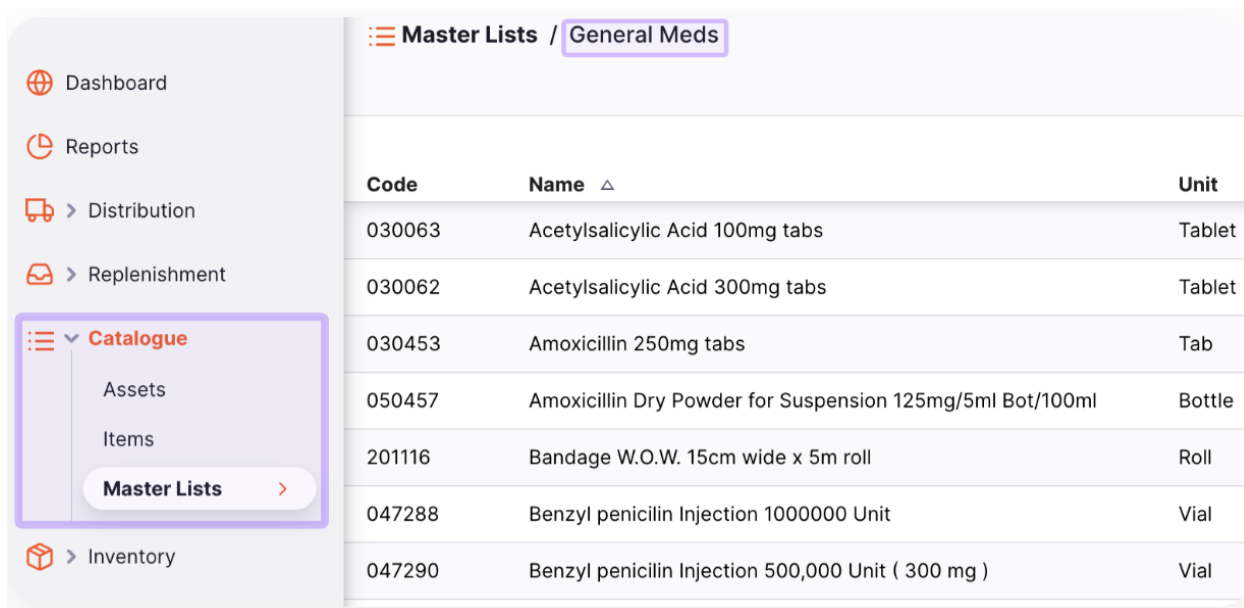
Provide this tip to the participants- Think of the ledger as the item's paper trail. If you ever need to answer, *"Where did this stock come from?"* or *"Why did our balance drop?"* — this is the first place to look.

Master Lists:

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

- Ensure consistent stock management
- Simplify requisition forms
- Support programmatic reporting

Note: Each store can be linked to one or more master lists depending on its role in the supply chain. You can view your master lists and the items inside them.



Master Lists / General Meds

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

Step 3: After the review of the components of the Catalogue, ask participants if they have questions. Conclude this session by referring participants to Knowledge check page for a quick quiz.

Session 9: View Stock

Session objectives:

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

1. Locate and use the View Stock function in Open mSupply.
2. Interpret the fields on the View Stock page.
3. Create new stock lines when necessary.
4. Enter stock line details accurately to avoid errors.
5. Apply best practices in stock entry for accountability and traceability.

Time: 80 minutes

Session Outline/Activity

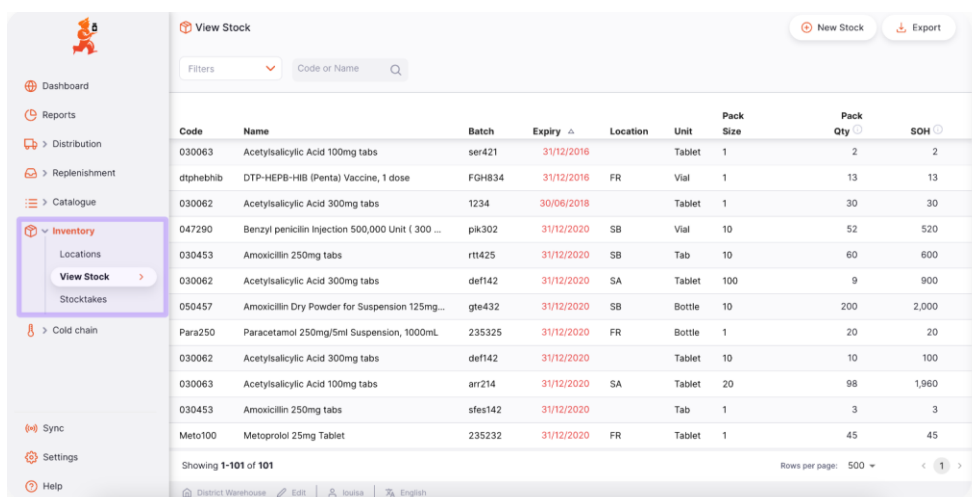
No.	Activity	Facilitation Method	Time Allotted
1.	Introduction to View Stock	Lecturette/ demonstration	40 minutes
2.	Filling in the Stock details	Lecturette/ demonstration	40 minutes

Activity 1: Introduction View Stock

Step 1: Tell participants that now that we understand how items are listed in your store's catalogue, let's see how we can view the actual stock you have on hand.

Step 2: We will be exploring View Stock function. View Stock is focused only on the items that physically exist in your store. Trainer should ensure participants are following.

Step 3: Below is the screenshot of where to locate View Stock.



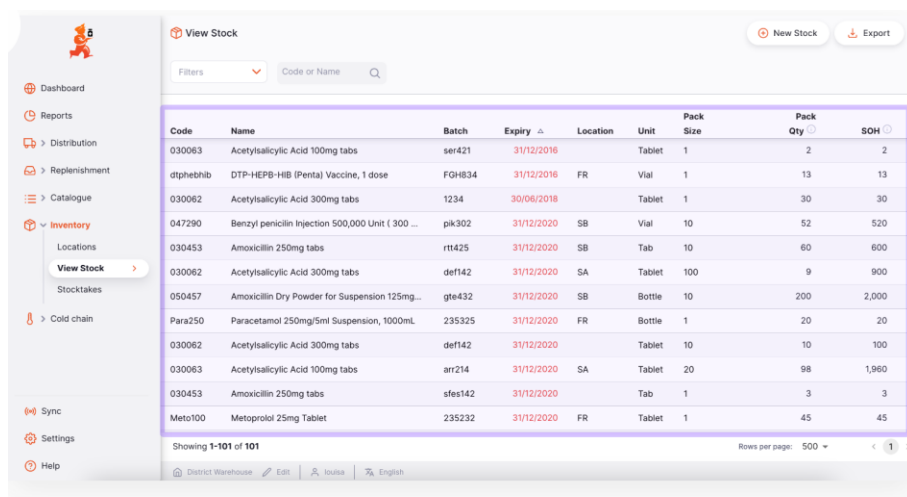
To see the stock that is currently in your store, go to **"Inventory"** → **"View Stock"**.

Step 4: Tell participants that it is important to understand the View Stock page and that each row in the View Stock page is called Stock line which represents one batch of an item that's currently available in your store- with specific expiry date, quantity, location, and packaging.

Step 5: Explain to the participants the following:

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

Step 6: Tell participants that we will be looking at the different fields in View Stock page.



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

Step 7: Below is the keys to the page. Review with participants for better understanding.

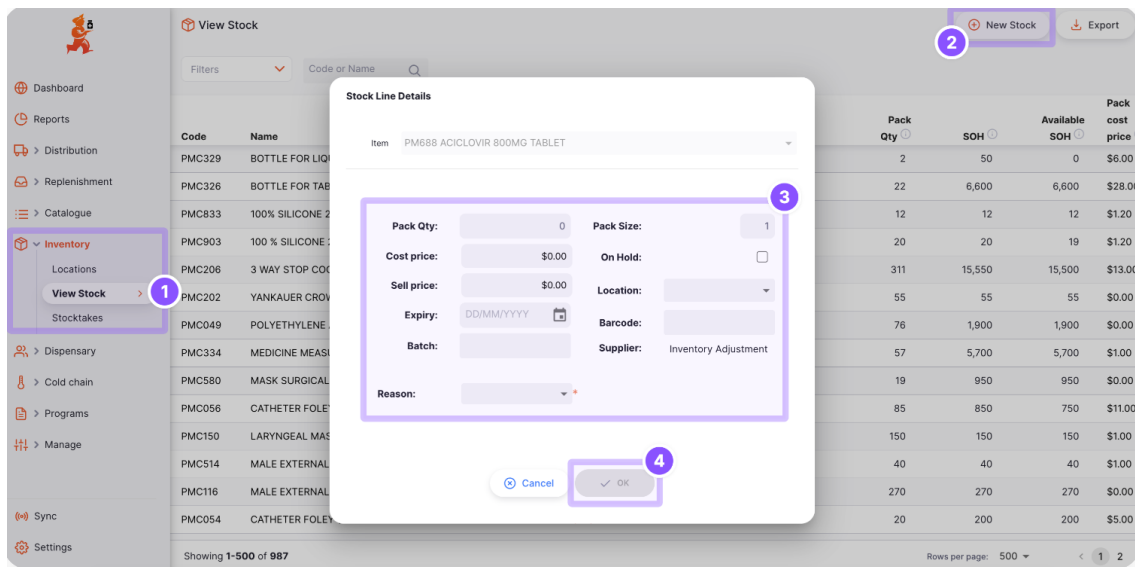
Field	What It Shows
Item code & name	The medicine or item in stock
Batch & expiry	Expiry date for that specific batch (expired ones are shown in red)
Location	Where the stock is physically stored
Pack size & unit	How the item is packed (e.g., bottles of 100 tablets)
Stock on hand	The total quantity you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

Trainer's Note:

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

Step 8: At the stage, let's look at how to create new stock (Creating New Stock). Tell participants that the **New Stock** button lets you manually add a new batch of stock into the system. This can be helpful in situations where stock isn't entered automatically through a supplier delivery, and you need to use the stock urgently.

Step 9: Inform participants to study the screenshot below for a few minutes. Ask if they have any questions after 5 minutes. Treat all questions interactively.



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

The following are examples of when to use it.

- You discover a missing item that is physically in stock but not in the system.
- You need to urgently record goods that were supplied, but the delivery wasn't captured — for example, if the supplier isn't set up in the system yet, or no official shipment was processed.

Activity 2: Filling in the Stock Line Details.

Step 1: Inform the participants that we will be looking at **Filling in the Stock Line Details**. The table below is our guide, study it for 10 minutes and let me know if you have any questions.

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

Best Practices:

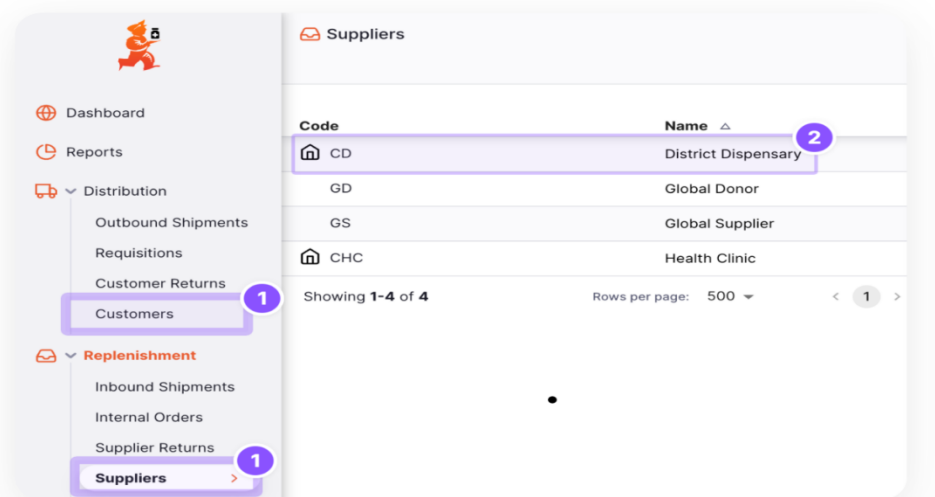
- Always fill in batch and expiry for traceability.
- Use accurate pack size and quantity to avoid inventory errors.
- Select the right reason so reports reflect why this stock was added.

Trainer's Note:


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

Step 2: Now we will be looking at how to enter the **Supplier and Customer Details**. Inform participants that to see information about the customers or suppliers available in the system, go to the relevant section from the navigation menu (Customers or Suppliers).

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



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

 **District Dispensary**

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

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

Trainer's Note:

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

Step 3: Conclude this session by referring participants to Knowledge check page for a quick quiz.

Session 10: Inventory Management

Session objectives:

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

1. Explain the importance of inventory management in healthcare supply chains.
2. Describe key concepts of inventory management: Stock on Hand (SOH), expiry dates, batch numbers, storage locations, and quarantine storage.
3. Apply these concepts in daily stock management to ensure accountability and accessibility.
4. Recognize how effective inventory management supports smooth healthcare service delivery.

Time: 20 minutes

Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Inventory Management	Lecturette/	20 minutes

Trainer's Note:

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

Activity 1: Inventory Management

Step 1: Start this session by asking participants to explain the importance of Inventory Management in healthcare. Allow volunteers to respond. Their responses should reflect stock management and availability.

Step 2: Trainer should explain that the First step in managing a healthcare supply chain is efficient inventory management. Also mention that inventory management encompasses tracking stock quantities, expiry dates, batches and storage locations to guarantee accountability and accessibility. Effective inventory management ensures that you always have the right products in stock without overstocking, reducing the risk of shortages or wastage, and ultimately contributing to better healthcare outcomes

Step 3: Tell participants to study the key Concepts of Inventory Management as listed below.

Stock on Hand (SOH)

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

Expiry Dates

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

Batch Numbers

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

Storage Locations

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

Quarantine Storage

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

Step 4: Conclude by appreciating the participants.

Session 11: Stocktakes

Session objectives:

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

1. Define what a stocktake is and explain its purpose.
2. Describe why stocktakes are important for accurate inventory management.
3. Differentiate between full and partial stocktakes.
4. Perform a new stocktake in Open mSupply.
5. Apply best practices to maintain stocktake integrity and accuracy.

Time: 225 minutes

Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	What is a Stocktake?	Lecturette	15 minutes
2.	Why are Stocktakes Important?	Lecturette	10 minutes
3.	How Stocktaking Works	Lecturette/ Group interaction	20 minutes
4.	How to Maintain Stocktake Integrity	Lecturette and Demonstration	20 minutes
5.	Creating a New Stocktake	Lecturette and Demonstration	20 minutes
6.	Performing the Stocktake	Lecturette and Demonstration	30 minutes
7.	Counting Items	Lecturette and Demonstration	25 minutes
8.	Print Options	Lecturette and Demonstration	10 minutes
9.	Finalise the Stocktake	Lecturette and Demonstration	15 minutes
10.	Bulk Actions on Stocktakes	Lecturette and Demonstration	20 minutes

Activity 1: What is a Stocktake?

Step 1: Welcome the participants to this session. Ask if anyone will volunteer to explain what a stocktake is. Give few minutes for Responses.

Step 2: Define stocktake and its goal. Use the information in the box below as a guide.

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

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

Ensure that all participants understand the definition and its goal.

Activity 2: Why are Stocktakes Important?

Step 1: The trainer should explain that stocktake is important in resolving discrepancies between recorded inventory and actual stock. Use the trainer box below for more explanation.

Trainer's note:

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

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



Step 2: Ask participants if they have experienced discrepancies during a stocktake and how they resolved the issue. Take responses from 3 to 4 participants to encourage large class interaction and discussion.

Activity 3: How Stocktaking Works

Step 1: Inform participants of the two main types of stocktaking, which are full stocktake and partial stocktake.

Trainer's Note:

Explain to participants that there are different types of stocktakes, and the method you choose can depend on the size of your inventory, the frequency of stock turnover, and your facility needs.

Step 2: Tell participants we will be looking at the meaning of full stocktake and partial stocktake and their processes.

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

Process of Full Stocktake:

1. **Preparation:** All stock is temporarily taken out of circulation for the duration of the stocktake. This means no new transactions should be made during the count to avoid discrepancies.
2. **Counting:** Staff members count every item in the inventory. Each product's quantity is recorded manually, and the stock is compared with the recorded quantities in the system. Where procedures allow, expiry dates and batch numbers are also checked to ensure stock is still valid and accurately recorded.
3. **Recording:** The counted quantities are entered into the system, and any discrepancies are noted. The system is then updated to reflect the accurate stock levels.
4. **Reconciliation:** If discrepancies arise, the cause must be investigated. This could involve checking for human errors, misplaced stock, or even potential theft.

Trainer's Note:

Inform participants that it is important to note that a full stocktake ensures that your records are completely aligned with the physical stock on hand.

Partial Stocktake: Is done when only a portion of the inventory is counted, rather than the entire stock. This is done when a full stocktake is not feasible, when there is limited time, or when the focus is on specific stock.

Process of Partial Stocktake

1. **Scheduled Counting:** Instead of doing a full stocktake, specific products, batches, or categories of items are counted on a rotating schedule. For example, you might count certain high-value items or frequently used stock items more often than others.
2. **Counting and Recording:** Just like with a full stocktake, the quantities of the selected items are counted and compared to the recorded data in the system.
3. **Reconciliation:** Discrepancies in the counted stock are resolved and updated in the system.

Trainer's Note:

Inform participants that it is important to note that a partial stocktake allows for regular checks without the need to halt operations completely. It can be useful for high-turnover products or for tracking critical stock levels throughout the year.

Activity 4: How to Maintain Stocktake Integrity.

Step 1: Explain to participants ways to maintain stocktake integrity using the information below and take questions afterwards:

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

Best Practice:

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

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

Best Practice:

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

3. **Review All Outstanding Outbound Shipments:** Before performing a stocktake in Open mSupply, it's important to review all **outbound shipments** that are still in progress.

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

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

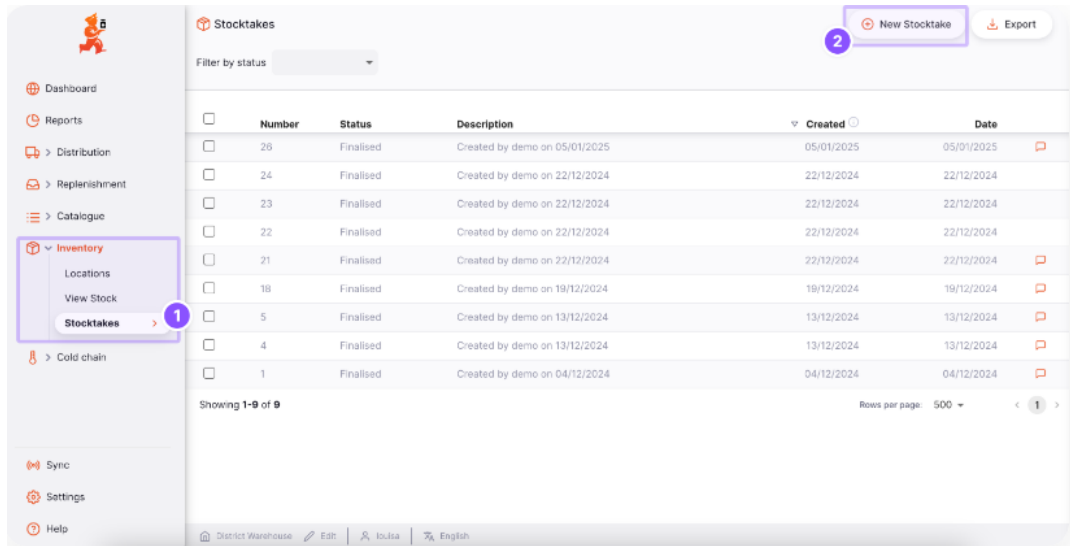
Best Practice:

- If Outbound Shipments are in the allocated state (not picked), be aware that they will still appear in your stocktake and should be counted.

- If Outbound Shipments are in the picked state, ensure that picked items are not on the shelf waiting to be counted, as these are not part of your stock anymore.

Activity 5: Creating a New Stocktake

Step 1: Inform participants that we will attempt to create a new stocktake by following the steps below:



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

New Stocktake

You can create a stocktake based on items currently assigned to a location, items that you currently have in stock, items assigned to a master list, or items expiring before a particular date.

To create an empty stocktake, simply click OK to continue.

Master List:

Location:

Items with Stock: ☒

Items expiring before:

4. Select OK.

Step 2: Inform the participants that with these steps completed, you have now created a new stocktake.

Activity 6: Performing the Stocktake

Step 1: We have successfully created a new stocktake. The next step is performing the stocktake.

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

Code	Name	Batch	Expiry	Location	Unit	Pack Size	Packs Snapshot	Packs Counted	Difference
030083	Acetylsalicylic Acid 100mg tabs	apc235	31/12/2033	SA	Tablet	20	247	-	
030083	Acetylsalicylic Acid 100mg tabs	abc123	31/12/2029	SA	Tablet	100	498	-	
030083	Acetylsalicylic Acid 100mg tabs	abd124	28/12/2025	SA	Tablet	10	60	-	
030083	Acetylsalicylic Acid 100mg tabs	abg414	31/12/2021	SA	Tablet	100	57	-	
030083	Acetylsalicylic Acid 100mg tabs	qwe143	31/12/2029		Tablet	1	20	-	
030083	Acetylsalicylic Acid 100mg tabs	tut333	31/12/2026		Tablet	1	100	-	
030083	Acetylsalicylic Acid 100mg tabs	qwe143	31/12/2029		Tablet	1	2	-	
030083	Acetylsalicylic Acid 100mg tabs	ser421	31/12/2016		Tablet	1	2	-	
030083	Acetylsalicylic Acid 100mg tabs	esfs3432	31/12/2025		Tablet	100	21	-	
030083	Acetylsalicylic Acid 100mg tabs	adw2414	30/09/2026	SA	Tablet	1	6,989	-	
030083	Acetylsalicylic Acid 100mg tabs	143143	31/12/2026	SA	Tablet	1	1,000	-	
030083	Acetylsalicylic Acid 100mg tabs	ATC143	31/12/2026	SA	Tablet	1	47	-	

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

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

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

⊕ Add Item
🖨 Print
⌵
📄 More

Details | Log

Pack Size	Packs Snapshot	Packs Counted	Difference	Reason
20	247	-	-	
100	498	-	-	
10	60	-	-	
100	57	-	-	
1	20	-	-	
1	100	-	-	
1	2	-	-	
1	2	-	-	
100	21	-	-	

Show / hide columns

- ☒ Code
- ☒ Name
- ☒ Batch
- ☒ Expiry
- ☒ Location
- ☒ Unit
- ☒ Pack Size
- ☒ Packs Snapshot
- ☒ Packs Counted
- ☒ Difference
- ☒ Reason

Rows per page: → Cor

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

⊕ Add Item
🖨 Print
⌵
📄 More

Stocktakes / 31

Description: Created by kousa on 05/06/2025

Stocktake Date: 05/06/2025

Details | Log

Code	Name	Batch	Expiry	Location	Unit	Pack Size	Packs Snapshot	Packs Counted	Difference
<input type="checkbox"/> 05457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bo...	ryt464	31/01/2025		Bottle	1	2	2	
<input type="checkbox"/> 050457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bo...	ryt464	31/01/2025		Bottle	1	8	8	
<input type="checkbox"/> 201116	Bandage W.O.W. 15cm wide x 5m roll	gtr253	31/12/2033		Roll	1	10	10	
<input type="checkbox"/> 047288	Benzyl penicillin injection 1000000 Unit	sfe121	31/05/2025		Vial	1	1	1	
<input type="checkbox"/> 047288	Benzyl penicillin injection 1000000 Unit	sfe121	31/05/2025		Vial	1	50	50	
<input type="checkbox"/> 047288	Benzyl penicillin injection 1000000 Unit	sfe121	31/05/2025	SB	Vial	1	10	10	
<input type="checkbox"/> 047290	Benzyl penicillin injection 500,000 Unit (300 mg)	fse214	31/12/2021	SB	Vial	1	1	-	
<input type="checkbox"/> 047280	Benzyl penicillin injection 500,000 Unit (300 mg)	jty142	31/12/2029		Vial	1	2	-	
<input type="checkbox"/> 031661	Captopril scored 25mg tabs				Tablet	-	0	-	
<input type="checkbox"/> clinda001	Clindamycin 300mg injection		31/08/2026		Ampoule	1	10	-	
<input type="checkbox"/> clinda001	Clindamycin 300mg injection	dob224	31/12/2028	SB	Ampoule	1	4	-	

Show / hide columns

- ☒ Code
- ☒ Name
- ☒ Batch
- ☒ Expiry
- ☒ Location
- ☒ Unit
- ☒ Pack Size
- ☒ Packs Snapshot
- ☒ Packs Counted
- ☒ Difference
- ☒ Reason

Showing 1-32 of 32
 Rows per page: 500

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

Activity 7: Counting Items.

Step 1: To begin entering physical counts, **select any item line.**

Edit Item

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

Unit: AMP

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

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

Cancel OK OK & Next

Step 2: You can then enter into the appropriate fields. Use the table below to guide participants on counting items:

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

Step 3: You can also review and update the **Pricing, Location**, or make a comment on a line if needed during the stocktake process.

Edit Item

Item: 030063 Acetylsalicylic Acid 100mg tabs

Unit: Tablet

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

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

Cancel OK OK & Next

Activity 8: Print Options (Optional)

Step 1: Inform participants that this is an optional step, use the **Print** dropdown if you want a physical sheet for manual counting. Explain to participants the forms available, which include:

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

Step 2: Once physical counts are completed, return to the stocktake in the system to **enter the actual counted quantities**.

Activity 9: Finalise the Stocktake

Step 1: Inform participants that once all items are counted, they should ensure the following:

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

Stocktakes / 31

Description: Created by louisa on 05/06/2025

Stocktake Date: 05/06/2025

Filter items

Details Log

<input type="checkbox"/>	Code	Name	Batch	Expiry	Location	Unit	Pack Size	Packs Snapshot	Packs Counted	Difference
<input type="checkbox"/>	050457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bo...	ryt464	31/01/2025		Bottle	1	2	2	
<input type="checkbox"/>	050457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bo...	ryt464	31/01/2025		Bottle	1	8	8	
<input type="checkbox"/>	201116	Bandage W.O.W. 15cm wide x 5m roll	gtr253	31/12/2033		Roll	1	10	10	
<input type="checkbox"/>	047288	Benzyl penicilin Injection 1000000 Unit	sfe121	31/05/2025		Vial	1	1	1	
<input type="checkbox"/>	047288	Benzyl penicilin Injection 1000000 Unit	sfe121	31/05/2025		Vial	1	50	50	
<input type="checkbox"/>	047288	Benzyl penicilin Injection 1000000 Unit	sfe121	31/05/2025	SB	Vial	1	10	10	
<input type="checkbox"/>	047290	Benzyl penicilin Injection 500,000 Unit (300 mg)	fse214	31/12/2021	SB	Vial	1	1	-	
<input type="checkbox"/>	047290	Benzyl penicilin Injection 500,000 Unit (300 mg)	jty142	31/12/2029		Vial	1	2	-	
<input type="checkbox"/>	031661	Captopril scored 25mg tabs				Tablet	-	0	-	
<input type="checkbox"/>	clinda001	Clindamycin 500mg Injection		31/08/2026		Ampoule	1	10	-	
<input type="checkbox"/>	clinda001	Clindamycin 500mg Injection	dol124	31/12/2028	SB	Ampoule	1	4	-	

Showing 1-32 of 32

Rows per page: 500

On Hold New Finalised

Confirm Finalised

Health Clinic Edit louisa English

Step 2: After finalising, inform the participants that:

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

Step 3: Automatically, the system will now update your stock levels, applying any gains or losses based on your counts.

Activity 10: Bulk Actions on Stocktakes

Step 1: Participants should note, each line in the stocktake has a **checkbox** on the left---- this lets you select one or more items to make bulk actions on.

You can use these checkboxes to:

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

The screenshot shows the 'Stocktakes / 31' interface. On the left is a sidebar with navigation options: Dashboard, Reports, Distribution, Replenishment, Catalogue, Inventory (selected), Locations, View Stock, Stocktakes (highlighted), Dispensary, Cold chain, Sync, Settings, and Help. The main area displays a table of stocktake items. The table has columns: Code, Name, Batch, Expiry, Location, Unit, Pack Size, Packs Snapshot, Packs Counted, and Difference. The first 10 items are selected with checkboxes. Below the table, a summary bar shows '32 Selected' and three bulk action buttons: 'Delete', 'Change location', and 'Reduce to 0'. The bottom of the interface shows 'Showing 1-32 of 32' and 'Rows per page: 500'.

Code	Name	Batch	Expiry	Location	Unit	Pack Size	Packs Snapshot	Packs Counted	Difference
050457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bo...	ryt464	31/01/2025		Bottle	1	2	2	
050457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bo...	ryt464	31/01/2025		Bottle	1	8	8	
201116	Bandage W.O.W. 15cm wide x 5m roll	gtr253	31/12/2033		Roll	1	10	10	
047288	Benzyl penicilin Injection 1000000 Unit	sfe121	31/05/2025		Vial	1	1	1	
047288	Benzyl penicilin Injection 1000000 Unit	sfe121	31/05/2025		Vial	1	50	50	
047288	Benzyl penicilin Injection 1000000 Unit	sfe121	31/05/2025	SB	Vial	1	10	10	
047290	Benzyl penicilin Injection 500,000 Unit (300 mg)	fse214	31/12/2021	SB	Vial	1	1	-	
047290	Benzyl penicilin Injection 500,000 Unit (300 mg)	jty142	31/12/2029		Vial	1	2	-	
031661	Captopril scored 25mg tabs				Tablet	-	0	-	
clinda001	Clindamycin 500mg Injection		31/08/2026		Ampoule	1	10	-	
clinda001	Clindamycin 500mg Injection	doi124	31/12/2028	SB	Ampoule	1	4	-	
met500	Metformin 500mg Tablets	4323	30/11/2029	SA	Tablet	1	410	-	

Step 2: Conclude the session by reminding participants that regular stocktakes are a key part of good inventory management. They help you keep records accurate, reduce losses, and maintain accountability.

Session 12: Location

Session objectives:

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

1. Define what a location is in Open mSupply.
2. Explain the importance of creating and managing locations.
3. Set up new locations in Open mSupply.
4. Assign stock to appropriate locations during receipt, stocktake, and inventory management.
5. Use the “On Hold” location for quarantined or questionable stock.

Time: 60 minutes

Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Managing Locations	Lecturette	10 minutes
2.	How to Set up a Location	Lecturette/ Demonstration	15 minutes
3.	“On Hold” Locations	Lecturette/ Demonstration	15 minutes
4.	Using the “On Hold” Location	Lecturette/ Demonstration	20 minutes

Trainer’s Note:

To introduce the session, tell the participants that now that we’ve covered key inventory principles, it’s important to understand **how and where stock is stored** in Open mSupply.

Open mSupply allows you to map and manage specific **storage locations** inside your store, from large warehouse zones to individual shelves or cold chain fridges. These locations help you stay organized, ensure compliance (especially for temperature-sensitive goods), and speed up stock retrieval during day-to-day operations or audits.

Activity 1: Managing Location

Step 1: Ask participants, “What do you understand by the word ‘Location’?” Take a few responses, then conclude by saying: In Open mSupply, **Locations** are used to define the specific places within your store where stock is kept. This could be as broad as a room (e.g. “Main Store”) or as specific as a shelf or bin (e.g. “A.01.03”)

Step 2: Participants should also know that when setting up a store, it’s a good idea to **create standard locations** that match your real-life storage layout. Examples are:

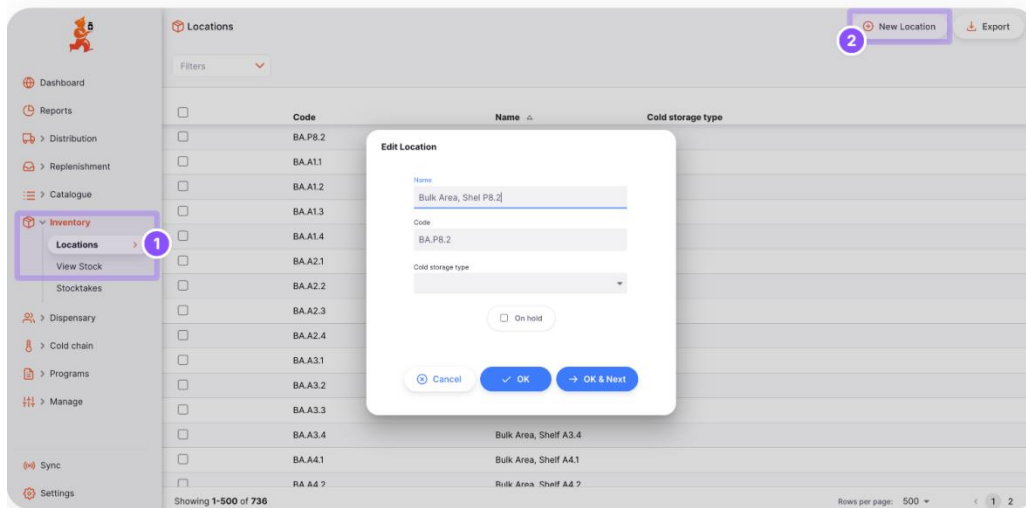
- **Refrigerators or cold rooms** for vaccines

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

Step 3: Conclude by telling the participants that locations help you stay organized, ensure compliance (especially for temperature-sensitive goods), and speed up stock retrieval during day-to-day operations or audits.

Activity 2: How to set up a Location

Step 1: Allow participants to study the screenshots below and practice to create a Location.



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

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

Step 2: Explain to participants that once locations are created, you can assign items to those locations during receipt, stocktake, or while managing inventory. This makes it much easier to:

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

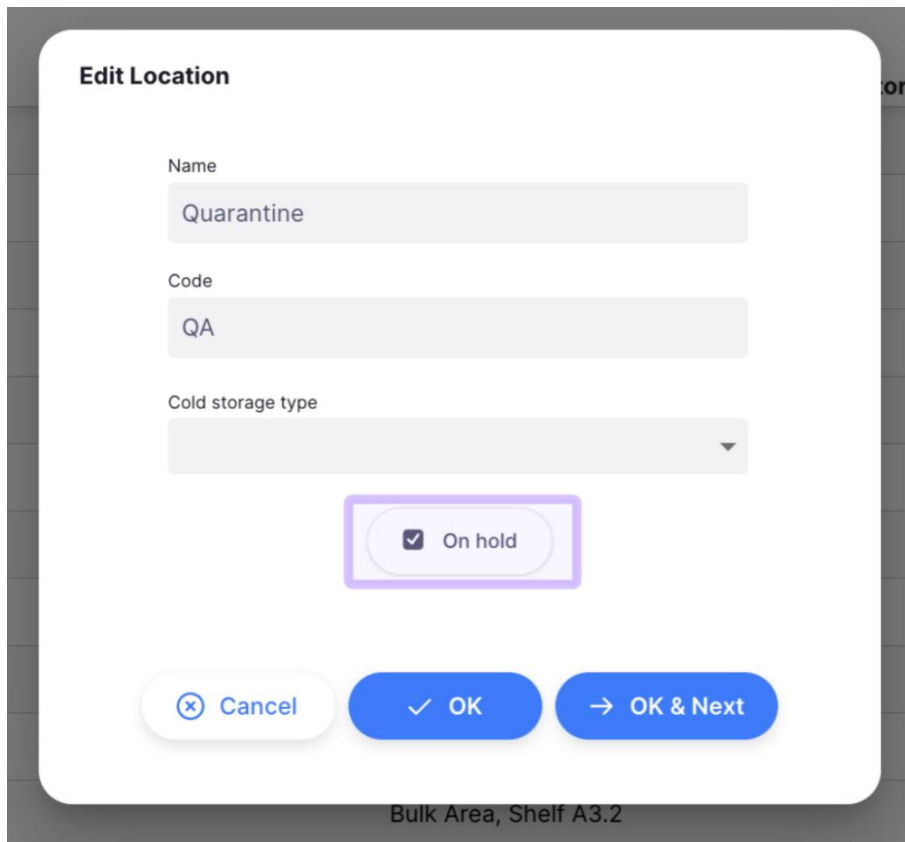
Trainer's Note:

Reiterate to participants that good location setup makes physical stock counts, audits, and batch tracking faster and more reliable.

Activity 3: “On Hold” Locations

Step 1: Ask participants, “what do you think “On Hold” means in Open mSupply?”. Allow 3 to 4 volunteers to respond. Appreciate them for their contributions.

Step 2: Then explain that in addition to standard storage locations in *Open mSupply*, a physical location can be placed “**On Hold**” to allow you to physically separate stock and prevent it from being issued or used from that location.



The screenshot shows the 'Edit Location' dialog box in the Open mSupply application. The dialog has a white background and rounded corners. It contains the following elements:

- Title:** 'Edit Location' in bold black text at the top left.
- Name field:** A text input field with the value 'Quarantine'.
- Code field:** A text input field with the value 'QA'.
- Cold storage type:** A dropdown menu with a downward arrow icon.
- On hold checkbox:** A checkbox labeled 'On hold' which is checked. This entire section is highlighted with a purple rectangular border.
- Buttons:** At the bottom, there are three buttons: 'Cancel' (with a close icon), 'OK' (with a checkmark icon), and 'OK & Next' (with a right arrow icon).

Below the dialog box, the text 'Bulk Area, Shelf A3.2' is visible on a dark grey background.

Activity 4: Using the "On Hold" Location

Step 1: Tell participants, 'Now lets look at ways of using the "On Hold"location in Open mSupply':

1. How to use the "On Hold" Location

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

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

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

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

Make it clear to all users that:

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

Step 2: Conclude the session by asking if there are questions. If no question, appreciate the participants.

Session 13: Repacks

Session objectives:

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

1. Define what repacking means in Open mSupply.
2. Explain why repacking is necessary in healthcare supply chains.
3. Demonstrate how to repack stock into smaller or larger packs using Open mSupply.
4. Fill in the repack form correctly.
5. Apply repacking best practices while ensuring stock accuracy.

Time: 35 minutes

Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	What is Repacking?	Lecturette	5 minutes
2.	How to Repack	Lecturette/ group demonstration	10 minutes
3.	Filling in the Repack Form	Lecturette/ group demonstration	10 minutes
4.	Repacking into Larger Packs	Lecturette/ group demonstration	10 minutes

Activity 1: What is Repacking?

Step 1: Start by asking participants if any of them have been involved in repacking before and what was the reason. Allow few responses from them. Use the trainer's box below as a guide to explain further.

Repacking is when you change how stock is grouped or packaged, without changing the total quantity of stock. Like taking large packs and turning them into smaller packs.

You might do this because:

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

Step 2: Let's look at an example that depicts repacking.

Let's say you received:

1 bottle with 1,000 iron tablets

- Pack Quantity = 1
- Pack Size = 1,000

- Total quantity = $1 \times 1000 = 1000$

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

100 small packs of 10 tablets each

- New Pack Quantity = 100
- New Pack Size = 10
- Total quantity = $100 \times 10 = 1000$

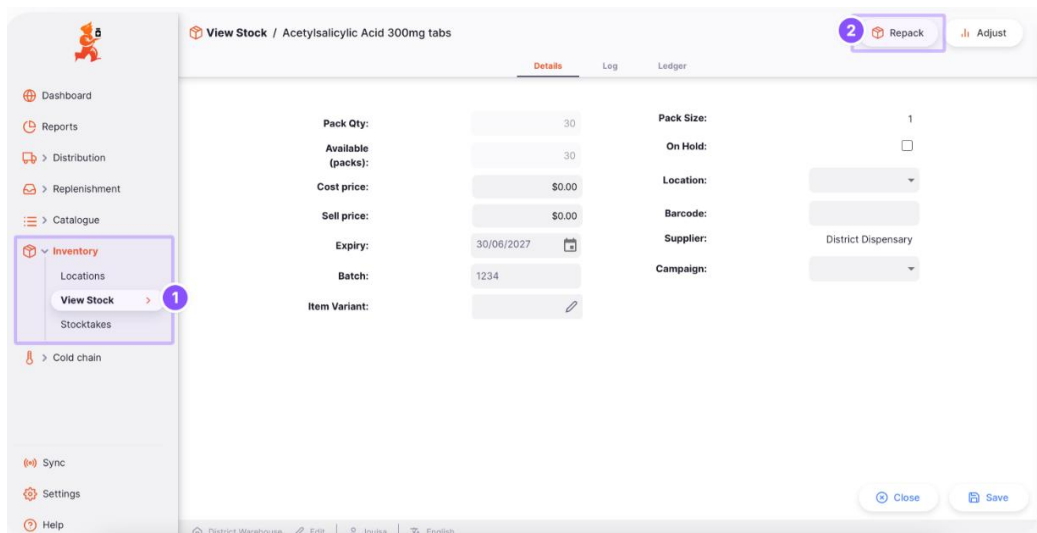
Step 3. At the end of the exercise, emphasize to the participants that *you still have the **same total (1000 tablets)**, but now the stock is grouped in a way that matches how you actually use it.*

Activity 2: How to Repack

Step 1: Tell participants that we will now practice how to repack using Open mSupply. Using the following steps:

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

Step 2: Demonstrate the steps to the participants, then give them 10 minutes to practice the steps on their own. Address any confusion before proceeding.



Activity 3: Filling in the Repack Form

Step 1: Now guide the participants to use this form to split big packs into smaller ones. For example, turning one bottle of 100 tablets into smaller packs of 10 tablets by following the steps below:

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

Repack Details

Acetylsalicylic Acid 300mg tabs
Code : 030062

1 **New**

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

Packs Available: 30

Number of packs to repack: 2 0

Pack Size: 1

Location: -

New number of packs: 0.00

New pack size: 3 0

New Location: ▼

Cancel Save Print ▼

Step 2: let the participants know that repacking **does not increase or decrease** your total quantity, it just changes the grouping. This means that your total amount of stock stays the same.

Activity 4: Repacking into Larger Packs

Step 1: Inform the participants that repacking is not only from larger pack to smaller packs but sometimes, you receive stock in small packs-- but you need larger groupings.

Step 2: Explain to participants some circumstances that may require repacking into larger packs, such as:

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

Step 3: Conclude the session by asking if there are questions. If no question, appreciate the participants.

Session 14: Inventory Adjustment, Log and Ledgers

Session objectives:

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

1. Define inventory adjustment and explain why it is necessary.
2. Apply the pre-adjustment checklist before making corrections.
3. Perform an inventory adjustment in Open mSupply.
4. Select appropriate adjustment reasons for accuracy and accountability.
5. Understand how to use the Log and Ledger tabs to track adjustments and stock history.

Time: 75 minutes

Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	What is an Inventory Adjustment?	Lecturette	10 minutes
2.	How to perform an Inventory Adjustment	Lecturette/ group demonstration	15 minutes
3.	Adjustment Reasons	Lecturette/ group demonstration	10 minutes
4.	Understanding the Log and Ledger Tabs	Lecturette/ group demonstration	20 minutes
5.	Tracking Adjustments	Lecturette/ group demonstration	20 minutes

Activity 1: What is an Inventory Adjustment?

Step 1: Welcome participants to this session. Now ask them if anyone can explain what is Inventory Adjustment. Allow interactions within the participants for 5 minutes. Then you should summarize by explaining that;

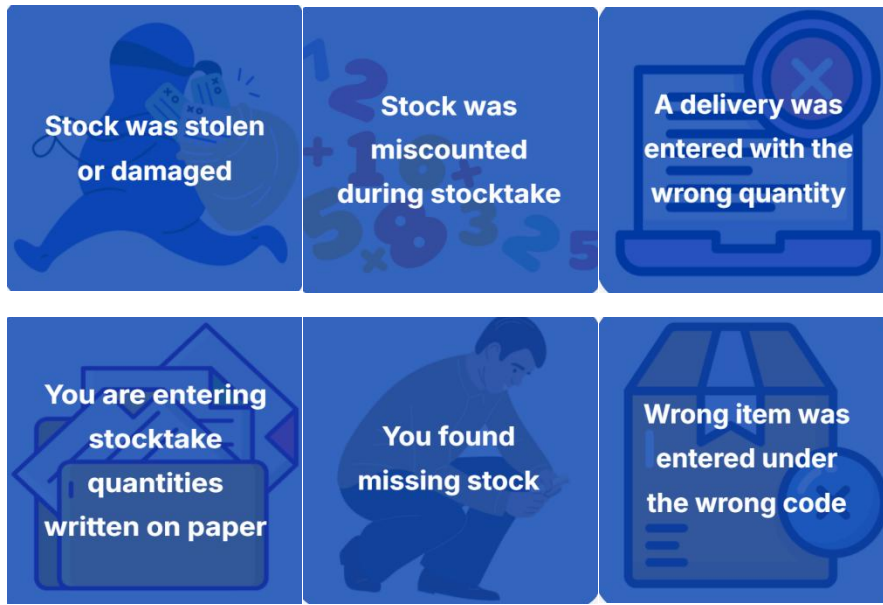
An **Inventory Adjustment** is a manual correction made in Open mSupply to fix the quantity of stock when it doesn't match the physical stock you have in your store.

Further explain that, 'it allows you to increase or decrease the number of packs recorded in the system, without deleting or editing the original transaction. This ensures you maintain a traceable audit trail and keep stock records accurate'.

Trainer's Note:

Inform participants that inventory adjustment can be positive or negative.

Step 2: Ask participants to study the inventory adjustment scenarios provided below. Instruct them that, 'Each card shows a stock scenario for adjusting your inventory, decide what action to take (increase, decrease, increase/decrease)'. Participants should read each card and provide their responses.



Step 3. At this point, let's look at pre-adjustment checklist. Explain to participants that these are what to do before inventory adjustment is made. They include;

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

Trainer's Note:

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

Activity 2: How to Perform an Inventory Adjustment

Step 1: Tell participants that we will be involved in a practical session on how to perform an inventory adjustment using the Open mSupply. Instruct participants as follows:

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

Step 2: Next is filling in the inventory adjustment form. Tell participants, ‘Use this form to correct your stock’. Example, when items are expired, missing, found, or damaged.

Tell participants that there are form fields and actions that must be completed in sequence when making an inventory adjustment. Explain to them that:

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

Step 3: Instruct participants to work on the example scenario. Ask participants to complete the entry on their devices.

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

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

The screenshot shows the 'View Stock / IBUPROFEN 200 MG TABLET' interface. A modal window titled 'Adjustment Details' is open. It contains the following fields and values:

- Pack:** 1
- Pack Qty:** 2,000
- Available (packs):** 2,000
- Adjustment Details:**
 - 1** Decrease quantity (selected from a dropdown)
 - 2** Reason: Expired (selected from a dropdown)
 - 3** by: 200 (entered in a text field)
- New Pack Qty:** 1,800 (calculated)
- Buttons: Cancel and OK (the OK button is highlighted with a purple box and a '4')

Step 4: Ask participants if they have completed entry and ask if they have any questions. Address questions if any and move on.

Activity 3: Adjustment Reasons

Step 1: let the participants know that for every adjustment, Open mSupply requires you to select a **reason** for the change. This ensures there's a clear, traceable explanation for every manual correction- which is important for audits, accountability, and understanding stock history.

Step 2: Ask participants to list some common reasons for increasing or decreasing Stock. Allow a few responses, then provide more explanation using the tables below.

Table 1: Common Reasons for Increasing Stock

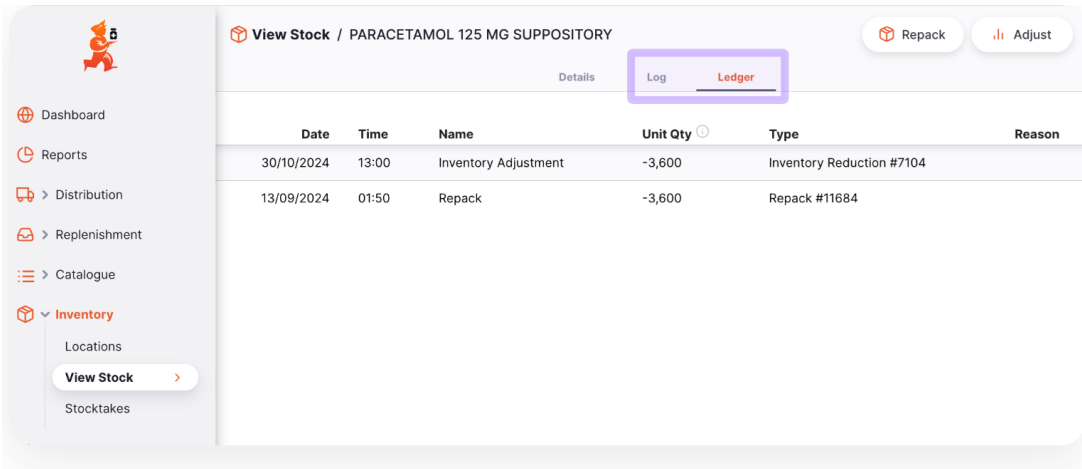
Reason	When to Use It
<i>Found during stocktake</i>	Physical stock was found that wasn't recorded in the system
<i>Recovered stock</i>	Stock was missing and has now been recovered
<i>Entry correction (undercounted)</i>	An earlier transaction didn't record the full quantity
<i>Returned from facility</i>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

Table 2: Common Reasons for Decreasing stock.

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

Activity 4: Understanding the Log and Ledger Tabs

Step 1: Tell participants that under View Stock, When you select a stock line in Open mSupply, you'll see two tabs: **Log** and **Ledger**.



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

The log and Ledger tabs help you understand the *history* and *status* of that item.

- The **Log** shows a **chronological list** of all actions performed on this stock line. It records who did what, when, and what changed.
- The **Ledger** shows the **running total** of stock over time for that particular stock line, like a bank account balance. Each row represents a transaction (e.g., +1 unit quantity received, -1 issued). It reflects the **unit quantity** after each change.

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

Activity 5: Tracking Adjustments

Step 1: Participants should know that all stock movements- including adjustments, repacks, and shipments — are automatically recorded in the **Ledger tab**. This provides a full history of what happened to each item, including:

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

Items / ASPIRIN 100 MG EC TABLET

Stock on Hand: 1,636,992 Units | Average Monthly Consumption: 12,787.5 Units | Months of Stock: 128.02 Months

General Master Lists **Ledger**

Type	Invoice Number	Date	Time	Name	Status	Expiry	Batch	Pack Size	Number of packs	Unit Qty	Balance	Pack cost price	Pack size
Outbound Shipments	11750	07/11/2024	02:03	Turangi District Hospital	Picked	30/09/2025	EC21106	990	2	-1980	-163362	\$4.00	\$
Repack	12120	31/10/2024	03:36	Repack	Verified	30/09/2025	EC21106	990	24	23760	-161382	\$4.00	\$
Repack	12119	31/10/2024	03:36	Repack	Verified	30/09/2025	EC21106	990	24	-23760	-185142	\$1.00	\$
Outbound Shipments	11712	31/10/2024	02:24	Turangi District Hospital	Shipped	30/09/2025	EC21106	990	2	-1980	-161382	\$4.00	\$
Outbound Shipments	11679	26/10/2024	01:02	Silver Fern Hospital	Shipped	30/09/2025	EC21106	990	24	-23760	-159402	\$1.00	\$
Outbound Shipments	11536	11/10/2024	00:50	Kauri Coast Tender Centre	Shipped	30/09/2025	EC21106	990	1	-990	-135642	\$4.00	\$
Outbound Shipments	11561	11/10/2024	00:38	Nelson Bay Health Centre	Shipped	30/09/2025	EC21106	990	1	-990	-134652	\$4.00	\$
Outbound Shipments	11489	02/10/2024	01:10	Southern Cross Lakeside Hospital	Shipped	30/09/2025	EC21106	990	72	-71280	-133662	\$1.00	\$
Outbound Shipments	11486	02/10/2024	00:30	Health Headquarters	Shipped	30/09/2025	EC21106	990	1	-990	-62382	\$4.00	\$
Outbound Shipments	11459	01/10/2024	03:12	Silver Fern Hospital	Shipped	30/09/2025	EC21106	990	24	-23760	-61392	\$1.00	\$
Inventory Addition	6942	24/09/2024	12:00	Inventory Adjustment	Verified	31/03/2026	D3D343C	168	18	3024	-37632	\$3.00	\$
Inventory Reduction	6943	24/09/2024	12:00	Inventory Adjustment	Verified	31/08/2026	D31028A	168	35	-5880	-37632	\$1.00	\$

Showing 1-23 of 23 Rows per page:

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

Step 2: Participants should also know that selecting a line in the Ledger will take you to the **exact transaction or record** where that stock movement occurred.

Step 3: Ask participants, “Why do you think the Ledger matters?.” Take a few responses from them. Then explain that the **Ledger helps supervisors and auditors trace stock changes. If there’s a problem or mismatch, you can come here to understand what happened.**

Trainer’s Note:

Inform participants that using **clear reasons** (like "Expired", "Found", "Damaged", or "Correction") ensures everyone can follow the story even months later.

Step 4: Tell participants to use these tips for accurate inventory adjustments and allow them a few minutes to study the list briefly

- Always double-check the **physical stock** first
- Always **include a reason** — this becomes part of the audit trail
- Don't use adjustments for normal receipts or issues — use the correct workflows (supplier invoice, distribution, etc.)
- If you're **decreasing** stock, confirm whether the item is **expired, damaged, or lost** and record that correctly.

Step 5: Conclude by asking if there are questions. If no question, appreciate the participants.

Session 15: The Order Cycle

Session objectives:

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

1. Explain how ordering works between facilities in Open mSupply.
2. Describe the four-step internal ordering workflow.
3. Demonstrate how internal orders are created, processed, and completed.
4. Understand how to manage orders with external customers not using mSupply.
5. Appreciate why proper order management is important for supply chain efficiency.

Time: 35 minutes

Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Ordering Between Facilities in Open mSupply	Lecturette	5 minutes
2.	The Four-Step Internal Ordering Workflow	Lecturette/ Group demonstration	15 minutes
3.	Dealing with External Customers and Suppliers	Lecturette/ Group demonstration	15 minutes

Activity 1: Ordering Between Facilities in Open mSupply

Trainer's Note:

Read the text below to introduce this session to participants:

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

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

Activity 2: The Four-Step Internal Ordering Workflow

Step 1: Inform participants that we will be looking at the Four-step internal ordering workflow. Briefly explain that when one facility needs stock from another facility that is also using mSupply, the process goes through **four simple steps**. Here’s how it works from start to finish as shown step by step in the diagram below.

Step 2: Give the participants 5 minutes to study the diagram.



This is a summary diagram of what is described below in the step-by-step process.

Step 3: Explain to the participants the step-by-step process as follows:

Step i: The Requesting Facility Creates an Internal Order

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

Step ii: The Supplying Facility Receives the Requisition

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

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

Once approved, they prepare to send the items.

Step iii: The Supplier Creates an Outbound Shipment

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

This shipment includes:

- Item names
- Batch numbers
- Quantities
- Expiry dates

This shipment is sent to the requesting facility.

Step iv: The Requesting Facility Receives the Stock

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

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

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

Step 4: Ask participants if they have any questions before you move to summary of the full workflow. Treat all questions interactively.

Step 5: Ask participants to now study the **Summary of the Full Workflow** as shown in the table below.

Step	Who Does It	What Happens
1. Create Internal Order	Requesting facility	Request is created and sent to the supplier
2. Receive Requisition	Supplying facility	Request is reviewed and approved
3. Outbound Shipment	Supplying facility	Stock is picked, packed, and sent
4. Inbound Shipment	Requesting facility	Stock is received and confirmed in the system

Step 6: Allow for questions and clarifications after the Summary of the Full Workflow reading.

Step 7: Ask participants why does the process matters. Their answers should be as follows:

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

Treat all outstanding questions before you proceed.

Activity 3: Dealing with External Customers and Suppliers

Step 1: Inform participants that sometimes, you may need to create an internal order or issue stock to a customer or supplier who is **not using mSupply**. This is common when working with smaller clinics, partner organisations, or programs that operate outside your system.

Tell participants to note that, in these cases, the process is **entirely manual**, meaning no automatic shipments or receipts will be triggered.

Explain to participants to know that:

Internal Orders Still Work: You can create an internal order as normal to document what's being requested.

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

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

No Sync or Visibility: The receiving party won't be notified or updated automatically — all communication and confirmation must be handled outside the system (e.g., by phone, email, or paper forms).

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

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

Trainer's Note:

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

Step 2: Conclude by asking participants if there are questions. If no questions, appreciate the participants for their time.

Session 16: Internal Orders

Session objectives:

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

1. Explain what an Internal Order is and when to use it.
2. Describe the benefits of using Internal Orders in Open mSupply.
3. Demonstrate how to create an Internal Order and add items.
4. Understand reorder thresholds and target MOS (Months of Stock).
5. Use graphs and stock data on the Internal Order page to make better ordering decisions.

Time: 100 minutes

Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	When Do You Use Internal Order?	Lecturette / group demonstration	20 minutes
2.	Creating an Internal Order and Adding Items to Orders	Lecturette / group demonstration	20 minutes
3.	Understanding Reorder Thresholds	Lecturette / group demonstration	20 minutes
4.	Understanding the Internal Orders Page	Lecturette / group demonstration	20 minutes
5.	Using The Ordering Page	Lecturette / group demonstration	20 minutes

Trainer's Note:

Ask a volunteer to remind the class of what an Internal Order means. Allow for a response. Then explain to participants that An Internal Order is a request for stock made from **one store to another**. It's commonly used when a lower-level facility, ward, or health centre needs to restock from a higher-level store, such as a warehouse, central medical store, or hospital pharmacy.

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

Activity 1: When Do You Use Internal Order

Step 1: Ask participants when do we use internal orders from your experience. Take a few feedback.

Step 2: Afterwards, explain what internal order is used for, give examples and benefits. You can use the information below.

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

Tell participants to note some common examples of using *internal orders*, which includes:

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

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

Step 3: Ask participants to read the benefits of using internal orders from the table below. Allow 5 minutes for them to read and answer any questions they have.

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

Step 4: After participants are fully aware of the benefits of using internal order, tell them let's look at what happens when you send an internal order:

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

Trainer's Note:

Remind participants that these are same as the 4-step workflow you learned in the previous session.

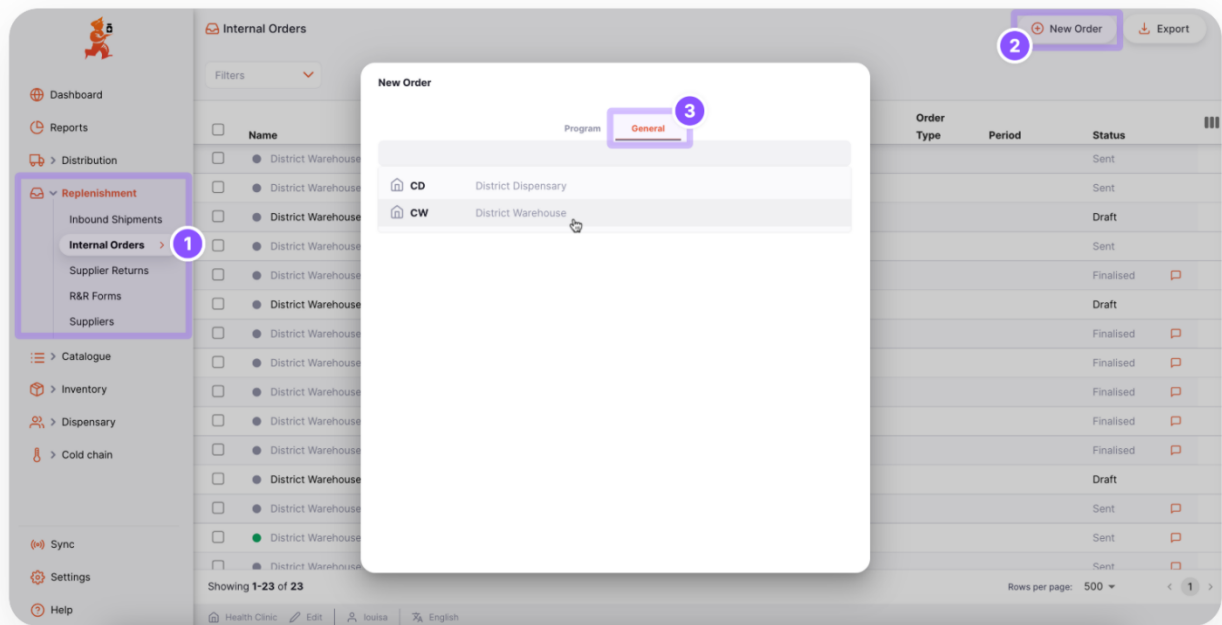
Step 5: inform participants to note the following before Creating an Internal Order.

Make sure:

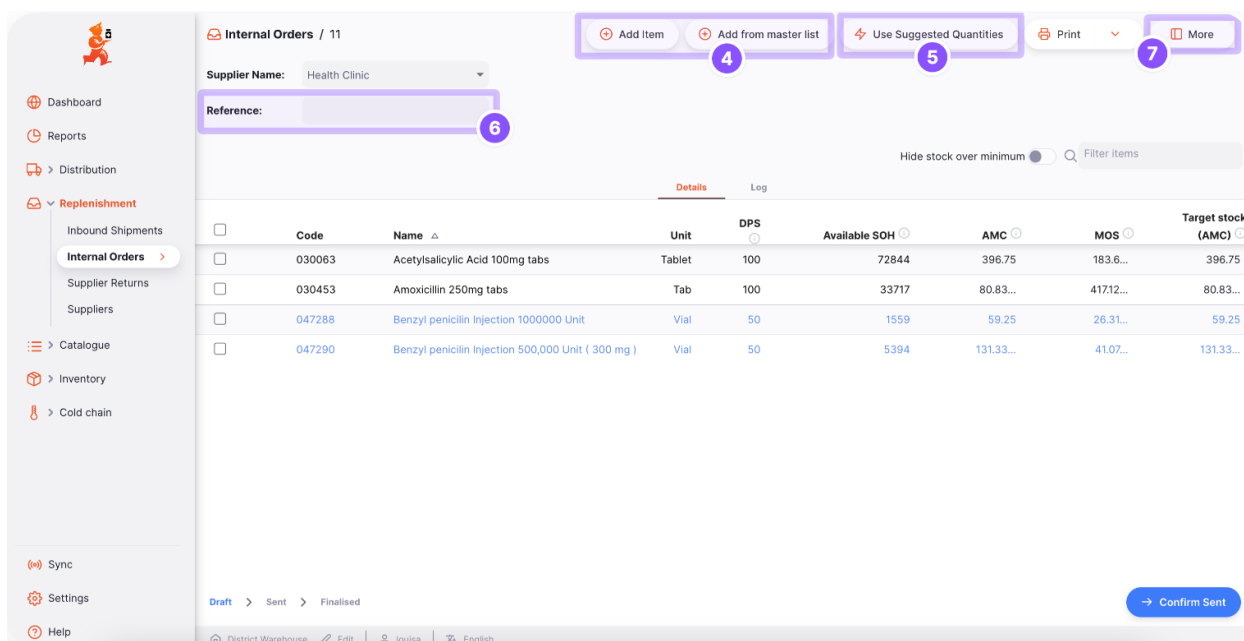
- You're logged in to the **correct store** (your facility)
- You've selected the right **supplying store**
- You've **synced** recently (before and after if offline)
- You've **checked the current stock** to avoid over-ordering

Activity 2: Creating an Internal Order/ Adding Items to Orders

Step 1: Inform the participants that we will be doing some hands-on-practicals on creating an Internal Order and adding items to orders. Then walk them through the steps:



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



4. Adding items to orders- you can add items in two ways:

- **Manually:** Click **Add Item** to search and select items from your item list.
- **From Master List:** Click **Add from Master List** to quickly add items that are on a master list.

5. Review and Use Suggested Quantities

- If your facility tracks consumption (AMC), the system can automatically suggest how much to order.
- Select **"Use Suggested Quantities"** to auto-fill the request column. This will fill in the suggested quantity for **ALL** items with no quantity entered.

6. **References:** You can also add a reference code or comment in the **Reference** field. These notes are for internal use only.

7. The **"More"** button opens a side panel with extra abilities for managing your internal order.

- **Order Info:** Shows your reorder threshold and target Months of Stock (MOS). These settings guide how much stock the system recommends.
- **Additional Info:** Shows who created the order, creation date, and lets you add a colour tag or comment to help identify or track the order later.
- **Actions:** Use the **"Delete"** button to delete the order if it's no longer needed.

Internal Orders / 43

Supplier Name: District Warehouse

Reference:

Hide stock over minimum ☐ Filter items

	Code	Name	Unit	DPS	Available SOH	AMC
<input type="checkbox"/>	030062	Acetylsalicylic Acid 300mg tabs	Tablet	30	39	8
<input type="checkbox"/>	030453	Amoxicillin 250mg tabs	Tab	100	20	19.25
<input type="checkbox"/>	clinda001	Clindamycin 500mg Injection	Ampoule	10	14	2.17...
<input type="checkbox"/>	met500	Metformin 500mg Tablets	Tablet	100	580	185
<input type="checkbox"/>	037021	Paracetamol Suppository 120mg	Each	20	100	0

Order info

Reorder threshold MOS: 1 Month

Target MOS: 6 Months

Additional info

Entered by: louisa

Created: 26/06/2025

Colour:

Comment:

Related documents

No shipments created yet.

Actions

Delete

Confirm Sent

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

Activity 3: Understanding Reorder Thresholds

Step 1: Explain to participants that In the **"Order Info"**, you can set re-ordering thresholds. These settings help Open mSupply suggest the right quantity to order for you, based on your **consumption** and **Months of Stock (MOS)**.

Order info

Reorder threshold MOS: 1 Month

Target MOS: 6 Months

Additional info

Entered by: louisa

Created: 26/06/2025

Colour:

Comment:

Related documents

No shipments created yet.

Actions

Delete

Participants should note the following:

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

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

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

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

Step 2: Use the scenario below to explain how reorder threshold works.

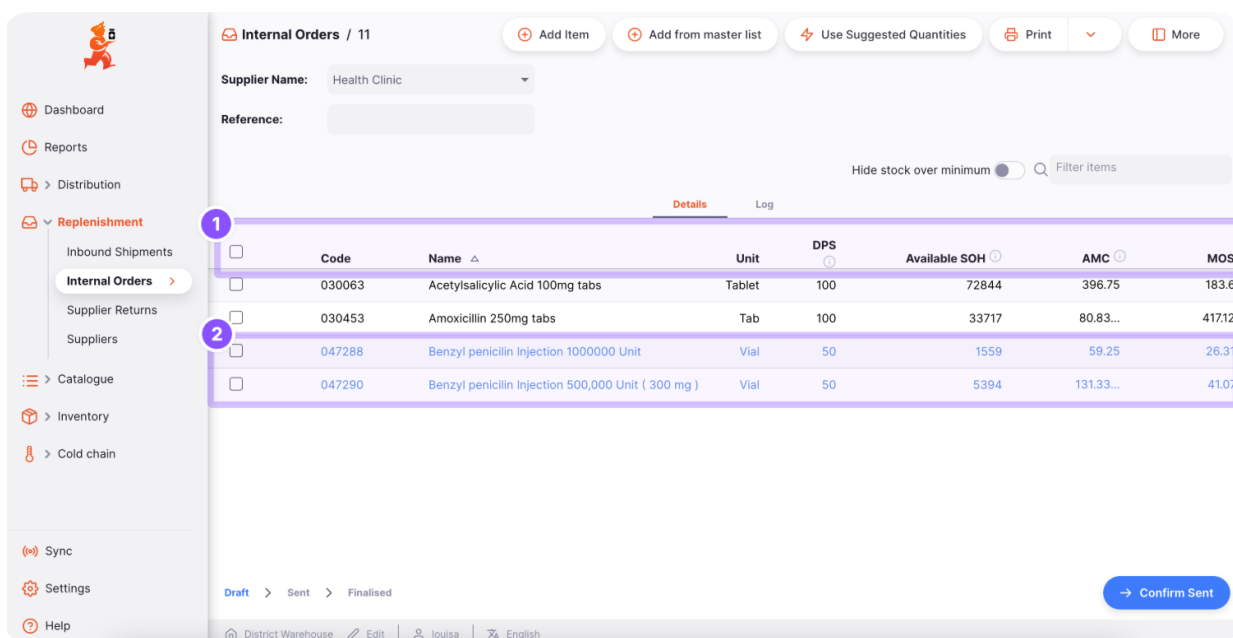
Let's say you currently have **80 tablets**, your reorder threshold is **1 month**, the target MOS is **3 months**, and your AMC is **100 tablets** per month:

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

Step 3: Ask participants if they have any questions. Answer their questions and provide more clarification where necessary.

Activity 4: Understanding the Internal Orders Page

Step 1: Inform participants that once your items have been added, this will appear in your internal order page. Scroll horizontally to see more information and vertically to see your full item list:



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

Step 2: Discuss the columns and their description, make it interactive with participants. Use the table below to explain the what these columns mean in detail.

1 What Do These Columns Mean?

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

Step 3. Ask participants: Why are some item lines blue? Allow everyone to respond, then summarize their answers..

Trainer's note:

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

Step 4: Ask participants: Who knows what Placeholder Lines mean? If there is no response, explain using the information below.

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

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

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

Step 5: Let's look at **Viewing Items for Order** for better understanding. Once Items have been added, you will see the following fields:

Field	Description
<i>Stock on hand</i>	What you currently have
<i>AMC</i>	Your average monthly consumption
<i>Target stock</i>	The amount of stock you want to maintain depending on the Target MOS (Months of Stock) that has been set
<i>Suggested quantity</i>	How much the system recommends you order
<i>Requested</i>	How much you have requested. You can accept the suggestion or change the number based on your needs if you have used the "Use Suggested Quantities" button.

Step 6: Participants should now practice navigating Open mSupply. Let's look at the Item Details Ordering page.

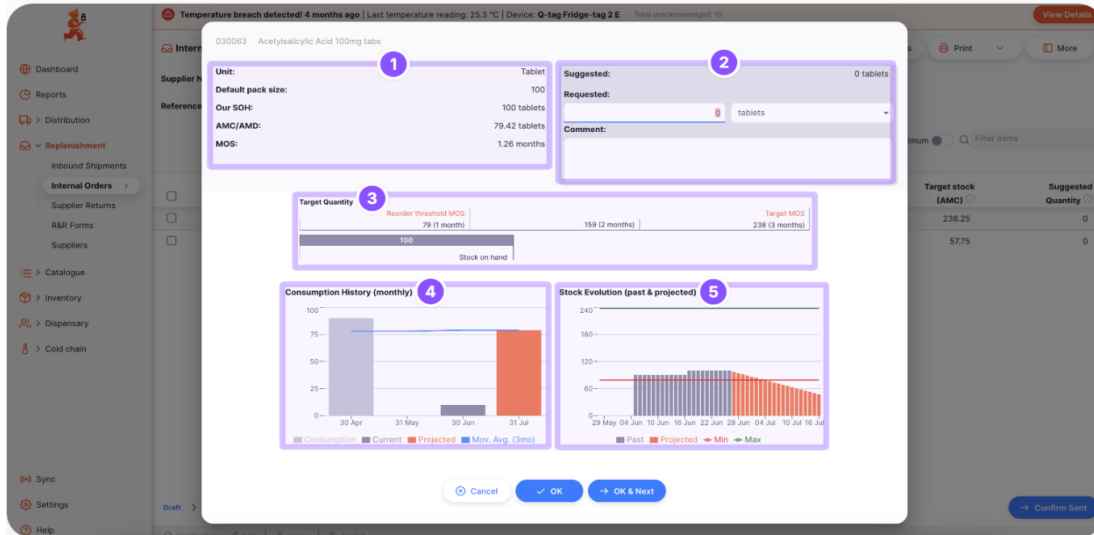
When you select an item in an Internal Order, Open mSupply provides visual graphs to help you:

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

Trainer's Note:

Explain to participants that these tools are especially helpful for avoiding stockouts or overstocking-without you needing to manually record and calculate how much stock is being used or needs to be ordered.

Step 7: At this point, let participants view what the Open mSupply page looks like. Walk the participants through item details and visuals as follows:



1. **Item & Stock Details:** This section gives you key information about the item, including current stock, usage rates, and how long your stock will last.

030063 Acetylsalicylic Acid 100mg tabs

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

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

2. Ordering Panel

Suggested: 0 tablets

Requested:

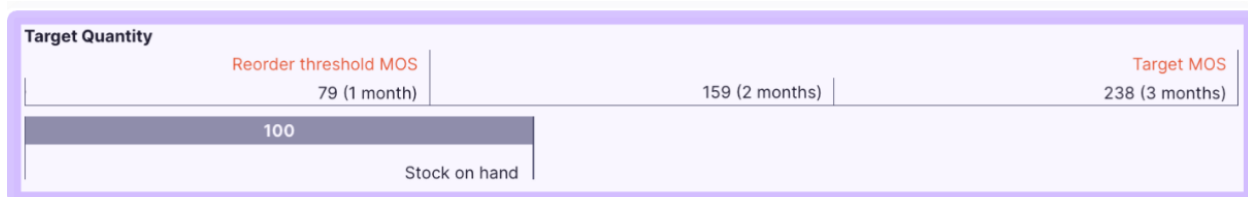
tablets

Comment:

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

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

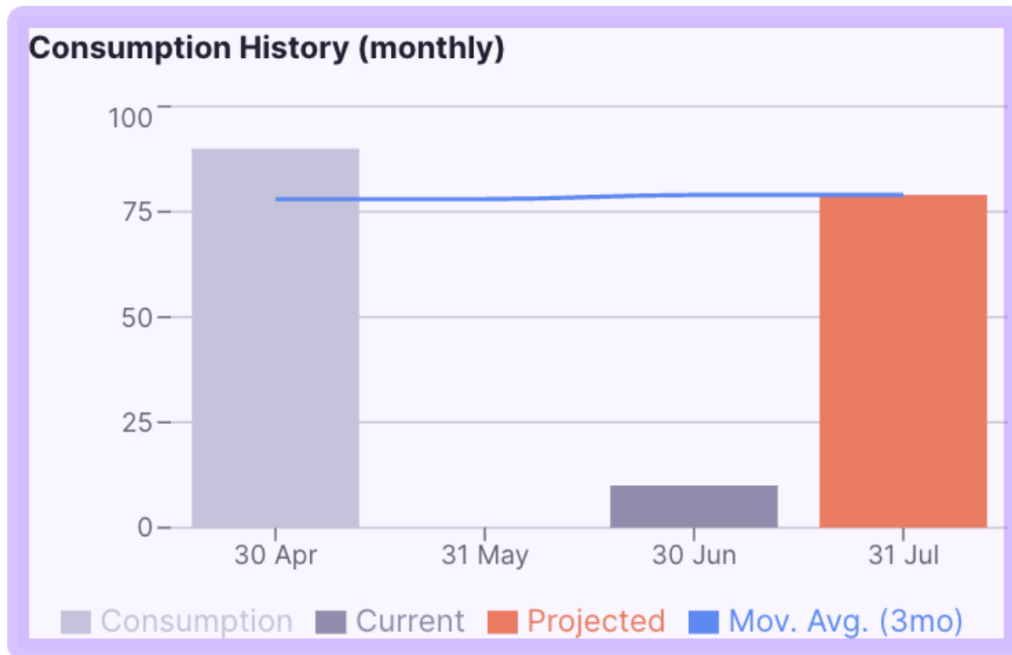
3. Target Quantity Bar



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

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

4. Consumption History Chart



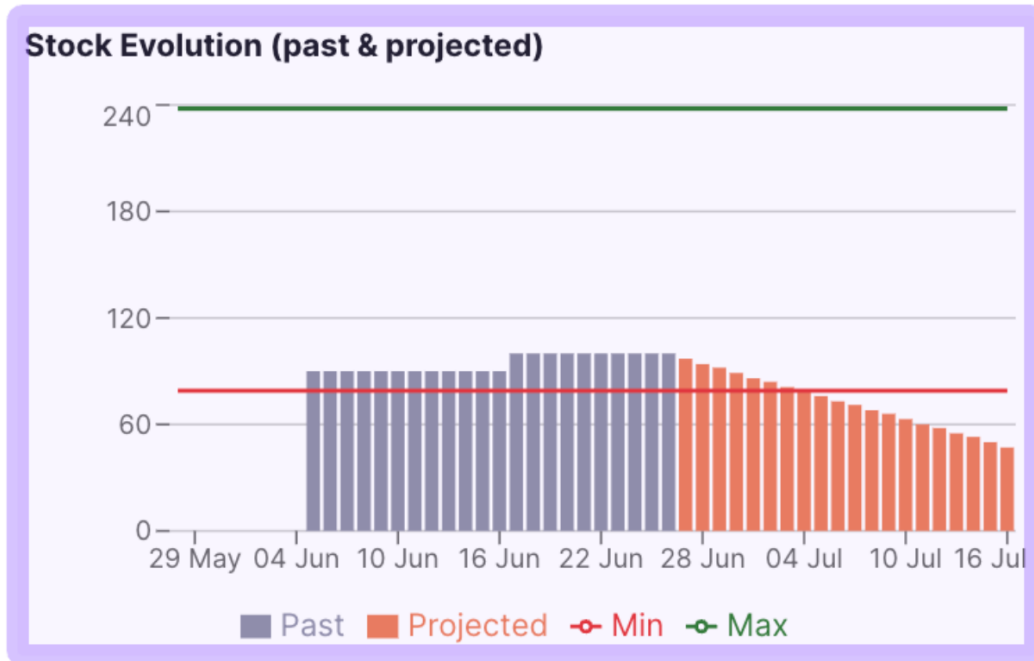
A chart showing past monthly usage to help identify trends and understand average demand.

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

How to Use It

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

5. Stock Evolution Chart



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

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

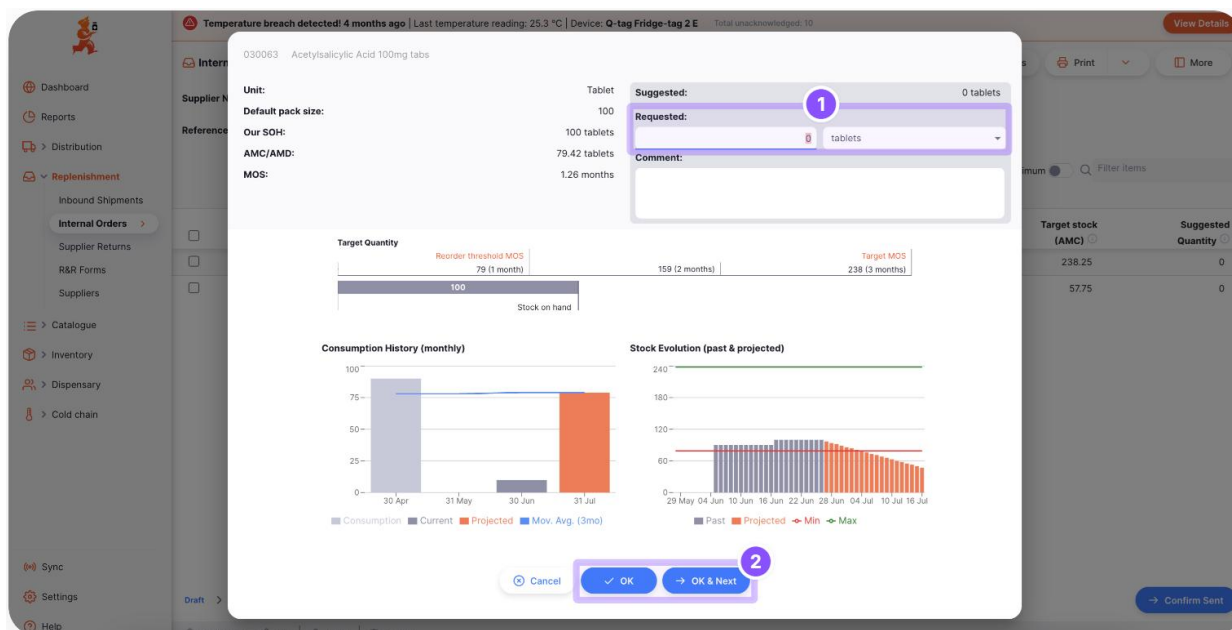
How to Use It

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

Step 8: Before starting the next activity, appreciate the participants for cooperating with you so far. Let them know that we are now going to be looking at using the ordering page.

Activity 5: Using The Ordering Page

Step 1: Now let's walk through how to use the ordering page step by step. I'll explain each section, and as we go along, please follow on your own screen. Feel free to stop me if something is unclear.



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

1. Check your current stock and usage

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

2. Use the graphs to guide your decision

Target Quantity Bar:

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

Consumption History:

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

Stock Evolution: Will you run out in the coming weeks if you don't reorder?

Putting It Together When Ordering

When reviewing an item:

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

3. Review the suggested quantity

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

4. Enter your request

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

Step 2: Inform participants that once all items and quantities are confirmed, proceed to Send the Order as follows:

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

Trainer's Note:

Tell participants to note that once sent, the order becomes read-only, and you cannot edit it any further.

Step 3: Show participants the Status Bar and explain that at the bottom of the screen are key statuses for your order. These show you exactly where your order is in the process-- from drafting to final confirmation:

The screenshot displays the 'Internal Orders' interface in mSupply. The left sidebar contains navigation options: Dashboard, Reports, Distribution, Replenishment (with sub-items: Inbound Shipments, Internal Orders, Supplier Returns, R&R Forms, Suppliers), Catalogue, Inventory, Dispensary, Cold chain, Sync, Settings, and Help. The main area shows 'Internal Orders / 43' with a 'Supplier Name' dropdown set to 'District Warehouse' and a 'Reference' field. Action buttons at the top include 'Add Item', 'Add from master list', 'Use Suggested Quantities', 'Print', and 'More'. A table lists items with columns for Code, Name, Unit, DPS, Available SOH, AMC, MOS, and Target stock (AMC). The table contains three items: Acetylsalicylic Acid 100mg tabs, Amoxicillin 250mg tabs, and Clindamycin 500mg Injection. A 'Status history' popup is visible, showing a progress bar with stages: Draft (selected), Sent, and Finalised, with a date of 26/06/2025. A 'Confirm Sent' button is at the bottom right.

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

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

Trainer's Note:

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

Step 4: Conclude the session by asking if there are questions. If no questions, appreciate participants.

Session 17: Requisition

Session objectives:

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

1. Define what a requisition is in Open mSupply.
2. Explain why requisitions are important in the ordering workflow.
3. Demonstrate how to open, process, and supply items in a requisition.
4. Use analysis tools (My Store, Customer Analysis) to make supply decisions.
5. Finalise requisitions appropriately, including handling partial supplies.

Time: 120 minutes

Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	What is a Requisition?	Lecturette	10 minutes
2.	Why Requisition matter, Overview of Requisition Process	Lecturette/ group demonstration	15 minutes
3.	Opening the Requisition, Processing the Requisition, Quick Supply of Items	Lecturette/ group demonstration	20 minutes
4.	“My Store” Analysis	Lecturette/ group demonstration	20 minutes
5.	“Customer” Analysis	Lecturette/ group demonstration	15 minutes
6.	Supplying Stock	Lecturette/ group demonstration	20 minutes
7.	Partial Requisitions	Lecturette	10 minutes
8.	Finalising the Requisition	Lecturette	10 minutes

Activity 1: What is a Requisition?

Step 1: Welcome back the participant from the break. Let them know we will be looking at Requisition.

Step 2. Ask if anyone can explain Requisition, take a few responses and finalize by defining Requisition- A **Requisition** is what the supplier facility sees after a customer sends an **Internal Order**. Requisitions allow the supplier to decide how much can be supplied, based on available stock or other constraints:

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

Step 3: Let's look at some requisition scenarios. Walk through the scenarios to make it practical.

1. Monthly Resupply

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

2. Emergency Request

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

3. Programme-Linked Supply

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

4. Out-of-Stock Handling

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

Activity 2: Why Requisition matter, Overview of Requisition Process

Step 1: After looking at the scenarios, we will now be looking at Why Requisition Matter. The trainer should use the following points to explain to participants.

1. Requisitions are not automatically approved

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

2. The supplier has the final say

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

3. No stock is moved when a requisition is created

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

4. It keeps a clear record

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

Step 2: Ask participants if they have any idea about the requisition process. Take one or two quick responses, then use the information below to explain the process.

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

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

Activity 3: Opening the Requisition/ Processing the Requisition/ Quick Supply of Items

Step 1: Inform participants that we are going to do some practical work on Requisitions. Please follow along on your screens.

Steps:

- i. Go to Distribution --> Requisitions
- ii. You'll see a list of requisitions from other facilities.
- iii. Select the one you want to work on.

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

Showing 1-25 of 25 Rows per page: 500

Step 2: Processing the Requisition. Tell participants that the list of requested items is shown in the requisition if it was sent by an mSupply store. Scroll to the right to see more information and vertically to see the full item list. Explain further as follows:

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

Buttons: Add Item, Supply requested, Print, More

Customer Name: Health Clinic Program: Customer Reference: From internal order 44 Filter items

Details Log

New > Finalised Create Shipment Confirm Finalised

District Warehouse Edit iouisa English

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

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

Lets look at each column and what it means. Table below refers

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

Step 3: Quick Supply of Items. Explain that the **"Supply requested"** button (1) is used to quickly populate the **Supply** column (2) with the same quantities listed in the **Requested** column (3).

Requisitions / 35

Customer Name: Health Clinic Program:

Customer Reference: From internal order 45

Filter items

Details Log

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

New > Finalised

Create Shipment Confirm Finalised

District Warehouse Edit louisa English

Further explain “When to Use This Button”.

Use “Supply requested” when:

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

Step 4: Proceed to **Reviewing Items Line by Line**. Explain to participants that once you’ve opened a requisition, the next step is to review each item carefully before creating a shipment.

This is where you take a closer look at what the customer has requested, compare it to your current stock, and decide how much you can actually supply.

Trainer’s Note:

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

Step 5: Referring to the visuals below, ask participants: ‘What do these fields mean?’ Use the table to guide and discuss their responses. Encourage multiple responses before you summarize.

030083 Acetylsalicylic Acid 100mg tabs

Default pack size: 100 tablets

Requested: 0.9 packs

Their SOH: 0 packs

Our SOH: 732.53 packs

Suggested: 0.88 packs

Supply: 0 packs

Remaining: 0 packs

Issued: 0 packs

Their AMC/AMD: 0.88 packs

Their MOS: 0 months

Comment:

Our Stock

Stock on hand: 732.53 packs

Stock arriving: 0.4 packs

Stock on order: 11 packs

Requested: 0.9 packs

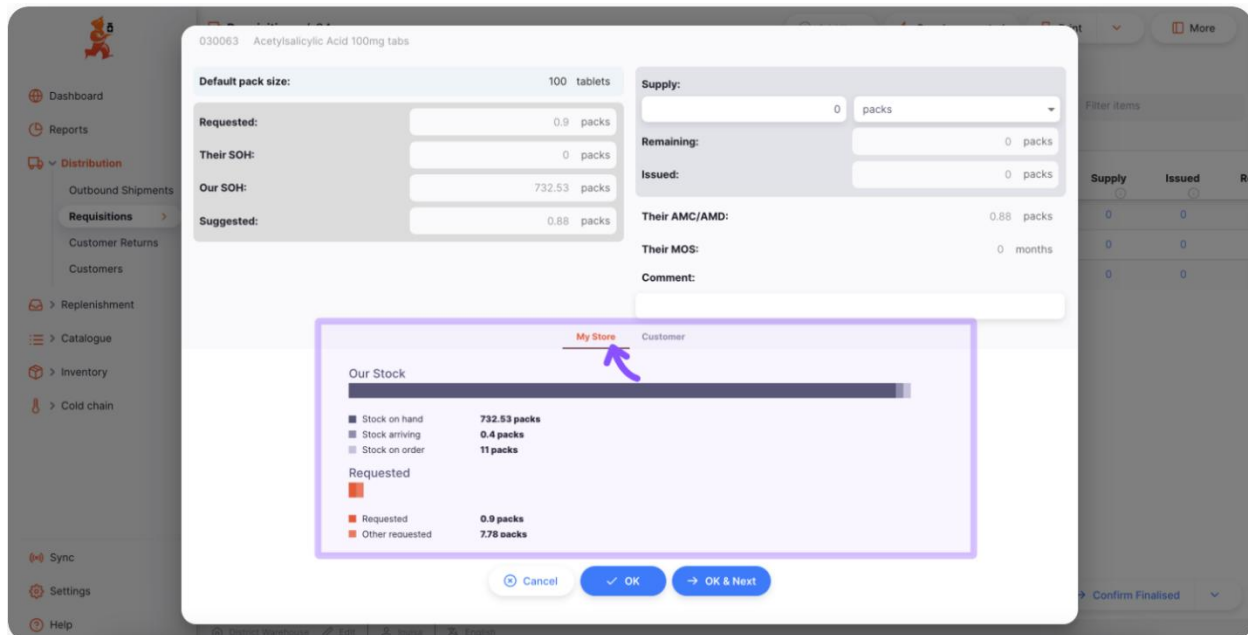
Other requested: 7.78 packs

Cancel OK OK & Next

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

Activity 4: "My Store" Analysis

Step 1: Explain to participants that, “You can also see a stock summary in the **"My Store"** tab. This section gives you a quick snapshot of your store’s current stock status for that item, helping you make informed supply decisions.



Step 2: While participants are viewing their screens, explain to them what it shows, the bars and values divided into two categories.

1. Our Stock

This shows what your store currently has or is expecting:

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

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

2. Requested

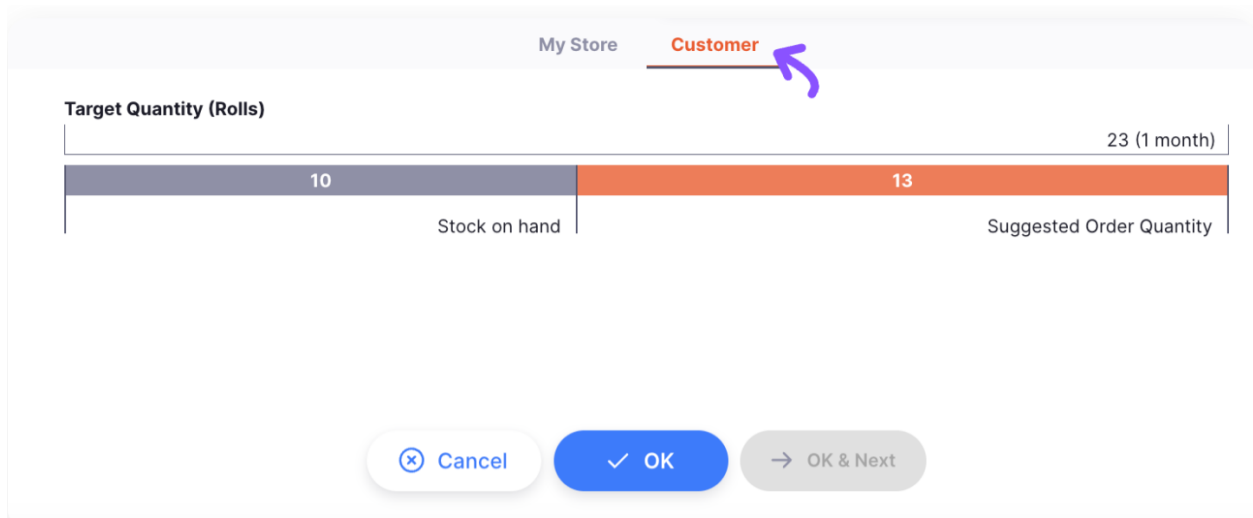
This shows what’s already been asked for — both in this order and by others:

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

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

Activity 5: “Customer” Analysis.

Step 1: Participants should know that the “Customer” tab shows how much stock the **requesting facility** (your customer) currently has and how much more they need to reach their target stock level.



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

Step 2: Explain to participants ‘How to Use This Information’ in the example above (Refer participants to visuals):

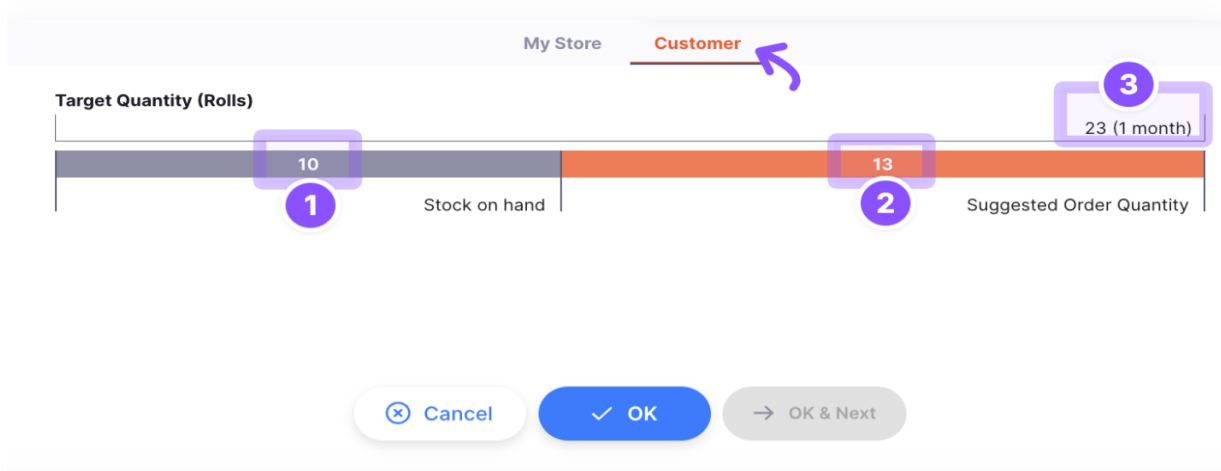
- **Gray Bar = 10 rolls** already in stock at the customer’s facility
- **Orange Bar** = Based on the customer's AMC, the system suggests supplying **13 rolls** for the customer to reach their target stock.
- **Target Line** = The customer needs **23 rolls** in total to meet their 1-month stock target.

Step 3: Proceed to explain to participants ‘**How to Make Decisions**’ using the Customer Analysis charts

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

Default pack size:	20 rolls	Supply:	<input type="text" value="0"/> rolls
Requested:	<input type="text" value="20"/> rolls	Remaining:	<input type="text" value="0"/> rolls
Their SOH:	<input type="text" value="10"/> rolls 1	Issued:	<input type="text" value="0"/> rolls
Our SOH:	<input type="text" value="658"/> rolls	Their AMC/AMD:	<input type="text" value="22.75"/> rolls 3
Suggested:	<input type="text" value="12.75"/> rolls 2	Their MOS:	<input type="text" value="0"/> months
		Comment:	<input type="text"/>

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



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

Activity 6: Supplying Stock

Step 1: Instruct participants to do the following on their screens:

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

- Match the requested amount
- Supply less (e.g., if you have limited stock)
- Enter 0 (if the item is out of stock or not approved for supply)

2. Once you are done, select **"OK"** or **"OK & Next"** for the next item.

- This action does not yet move stock — it records your plan.

030063 Acetylsalicylic Acid 100mg tabs

Default pack size: 100 tablets

Requested: 0.9 packs

Their SOH: 0 packs

Our SOH: 732.53 packs

Suggested: 0.88 packs

Supply: 0 packs

Remaining: 0 packs

Issued: 0 packs

Their AMC/AMD: 0.88 packs

Their MOS: 0 months

Comment:

Our Stock

- Stock on hand: 732.53 packs
- Stock arriving: 0.4 packs
- Stock on order: 11 packs
- Requested: 0.9 packs
- Other requested: 7.78 packs

Cancel OK OK & Next

Step 2: let's proceed to “Create the Shipment”. Explain to participants that:

Requisitions / 34

Customer Name: Health Clinic Program:

Customer Reference: From internal order 44

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

New Finalised

Create Shipment Confirm Finalised

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

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

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

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

Activity 7: Partial Requisitions

Step 1: Explain to participants that in many cases, you might not be able to supply the full quantity requested, especially if stock is limited. This is where the **Issued** and **Remaining** columns become especially useful.

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

This helps you:

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

Step 2: Tell participants “What to Do in a Partial Supply Situation” as follows:

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

Activity 8: Finalising the Requisition

Step 1: Explain the following to participants:

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

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

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

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

What does this do?

- Locks the requisition so no further changes can be made

- Prevents any new shipments from being created under this requisition
- Marks the transaction as complete in the system

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

Trainer's Note:

Warn participants never to finalise a requisition if there are still placeholder lines or pending supplies. Finalising too early will block further shipments and may cause confusion or missed deliveries.

Always finalise only when you are certain that all supplies have been issued and the requisition is fully complete.

Step 2: Conclude the session by asking if there are any questions. If no questions, appreciate the direct participants.

Session 18: Outbound Shipment

Session objectives:

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

1. Define what an Outbound Shipment is and explain when it is required.
2. Describe the importance of outbound shipments for traceability, accountability, and accuracy.
3. Identify and explain the different stages of the outbound shipment workflow in Open mSupply.
4. Perform allocation of stock (manual, automatic, and quick allocation) in Open mSupply.
5. Demonstrate how to pick, pack, and ship stock using Open mSupply.
6. Explain how to manage rejected/returned stock through outbound shipment returns.
7. Track and interpret shipment status updates (Allocated → Picked → Shipped → Delivered → Verified).

Time 70 minutes

Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	When To Use An Outbound Shipment?	Lecturette/ group demonstration	20 minutes
2.	Outbound Shipment Stages	Lecturette/ group demonstration	20 minutes
3.	Performing an Outbound Shipment	Lecturette/ group demonstration	15 minutes
4.	Returning Stock From Outbound Shipment	Lecturette/ group demonstration	15 minutes

Trainer's Note:

Welcome the participants to this session, **"Outbound Shipment"**. Let the participants know that it's a long session that will require their attention.

Ask a volunteer to remind the class of what an Outbound Shipment is. Thank the volunteer for responding and then explain outbound shipment for participants.

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

Activity 1: When to Use an Outbound Shipment?

Step 1: Explain to participants that outbound shipments are needed when:

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

Step 2: Discuss examples of outbound shipments with participants. Provide facility-specific examples for participants to relate to — e.g., issuing stock to a rural health facility, supplying vaccines, or sending emergency items.)

Step 3: Discuss the ‘Roles’ of personnels in outbound shipment using the table below with participants.

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

Step 4: Proceed to discuss **Why It Matters** with participants. Ensure the discussion is interactive, then provide further explanation as needed with the following:

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

Activity 2: Outbound Shipment Stages

Step 1: Explain to participants that each shipment in Open mSupply moves through a series of clearly defined stages. These stages help track the status of the shipment from preparation to delivery and final confirmation.

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

The screenshot shows the 'Outbound Shipments' page in Open mSupply. The sidebar on the left has a 'Distribution' menu item highlighted with a purple box and a circled '1'. The main content area shows a list of shipments for 'Health Clinic'. The table below lists three items with their respective codes, names, units, and prices. At the bottom, a status bar shows the progression of a shipment through various stages: New, Allocated, Picked, Shipped, Delivered, and Verified. A 'Confirm Allocated' button is highlighted with a purple box and a circled '3'.

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

Go to **Distribution** → **Outbound Shipment** (1). Once inside an Outbound Shipment, you will be able to see the stage your shipment is on (2), and update the status as it's completed (3).

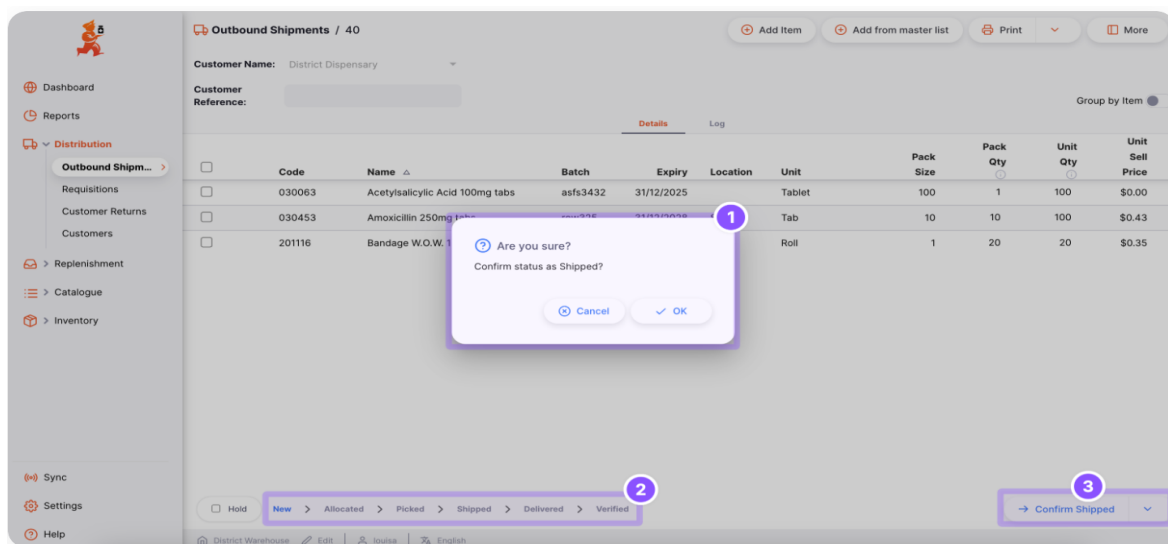
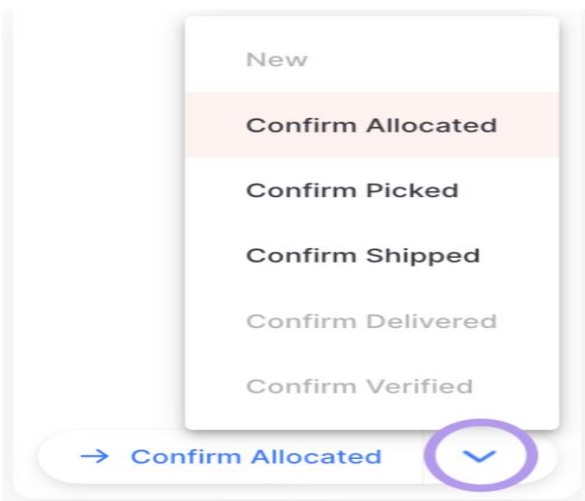
Step 2: Ask participants to study the table below for 10 minutes in order to understand the different stages of outbound shipment. Ask if they have any questions. Provide responses to questions and clarify grey areas for participants.

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

Trainers Note:

Inform participants to note the following:

- Not all shipments need to go through every stage.
- Depending on your workflow and system settings, you may skip some steps for example, going straight from Allocated to Shipped.
- Select the dropdown shown to skip stages more quickly.
- After each stage of the Outbound Shipment process is completed, the user must confirm the status in the system to reflect progress.



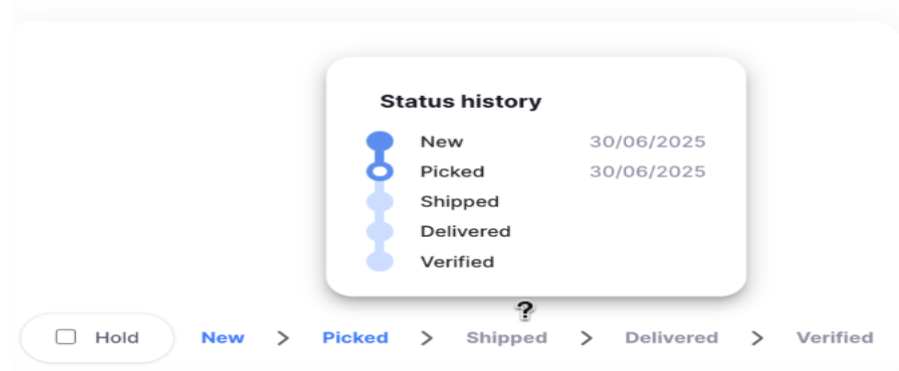
If you are skipping statuses, make sure to confirm afterwards to ensure the progress is complete. This will give a warning (1) and once the action is complete, the status will update to blue (2) and the button (3) will show the next stage.

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

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

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

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



Step 3: Tell participants that now that they know what an outbound shipments is, when to use it and how the status works, it’s time to walk through the process step by step. In the following sessions, you’ll learn how to allocate items, pick and pack stock, update the shipment status, and complete the shipment. Let them know that their attention is required. Lets begin.

Activity 3: Performing an Outbound Shipment

Step 1: Allocating Stock

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

- In some settings, this task is done by a supervisor or manager who decides what to send, and then a picker/packer physically collects the items based on that allocation.
- In smaller stores, it might be the same person doing it all.

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

Step 2: How to Allocate Stock

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

Edit Item

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

Issue: 0 Tablets

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

Buttons: Cancel, OK, OK & Next

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

1. Auto-allocate using the Issue field

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

Trainer's Note:

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

2. Manual allocation using Packs Issued

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

Edit Item

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

Issue: **Tablets**

Batch	Expiry	Location	Pack sell price	Pack Size	In Store (packs)	Available (packs)	Packs Issued	Tablets Issued	On Hold
arr214	31/12/2020	SA	\$0.05	20	98	98	0	0	
✓ abg414	31/08/2025	SA	\$0.05	100	57	57	0	0	
✓ ser421	30/11/2025	SA	\$0.10	1	2	2	0	0	
✓ asfs3432	31/12/2025	SA	\$0.03	100	20	19	0	0	
✓ asfs3432	31/12/2025	SA	\$0.03	1	100	100	0	0	
✓ asfs3432	30/09/2026	SA	\$0.04	1	6000	6000	0	0	
Total quantity								100	

Buttons:

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

3. Red expiry dates

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

4. Total Quantity

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

Trainer's Note:

Explain to participants that:

- Once you have entered the quantity to issue, the **"Tablets Issued"** column will update automatically.
- When the total **Tablets Issued** matches the "Total quantity" at the bottom of the screen, it confirms that you've fully allocated the amount requested in the requisition. (As seen below)
- Once you have finished allocating your stock for that item line, select the **OK & Next** button to move on and repeat the same steps for the remaining items in the shipment.

Edit Item

Item: 030063 Acetylsalicylic Acid 100mg tabs

Available: 72553 Tablets

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

Batch	Expiry	Location	Pack sell price	Pack Size	In Store (packs)	Available (packs)	Packs Issued	Tablets Issued	On Hold
arr214	31/12/2020	SA	\$0.05	20	98	98	0	0	
✓ abg414	31/08/2025	SA	\$0.05	100	57	57	1	100	
ser421	30/11/2025	SA	\$0.10	1	2	2	0	0	
✓ asfs3432	31/12/2025	SA	\$0.03	100	20	19	0	0	
asfs3432	31/12/2025	SA	\$0.03	1	100	100	0	0	
arr214	30/09/2026	SA	\$0.04	1	6 989	6 989	0	0	
Total quantity								100	

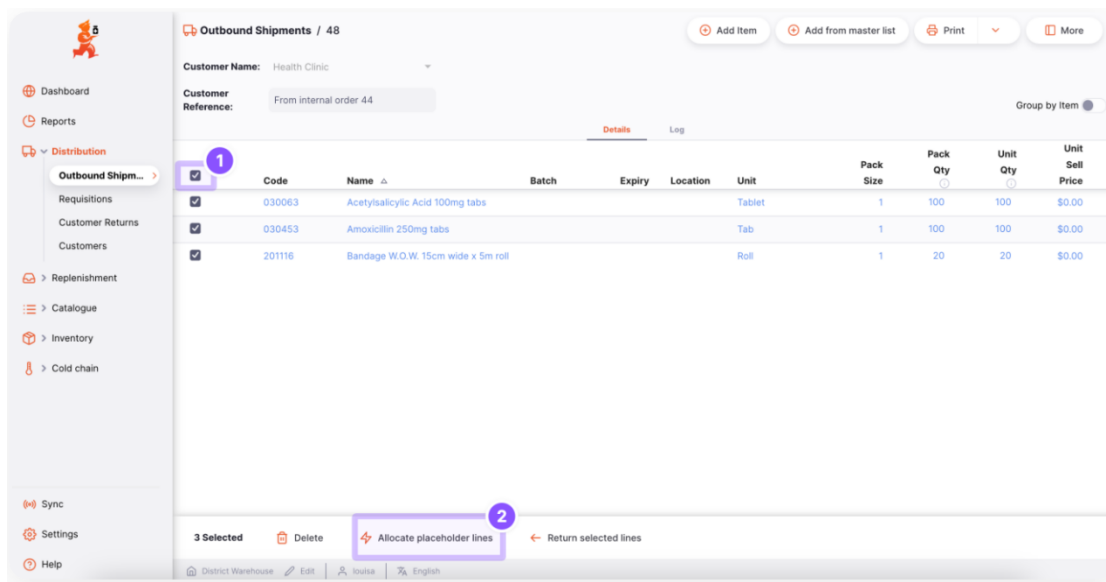
2 3

Cancel
OK
→ OK & Next

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

Step 3: Quick Allocation

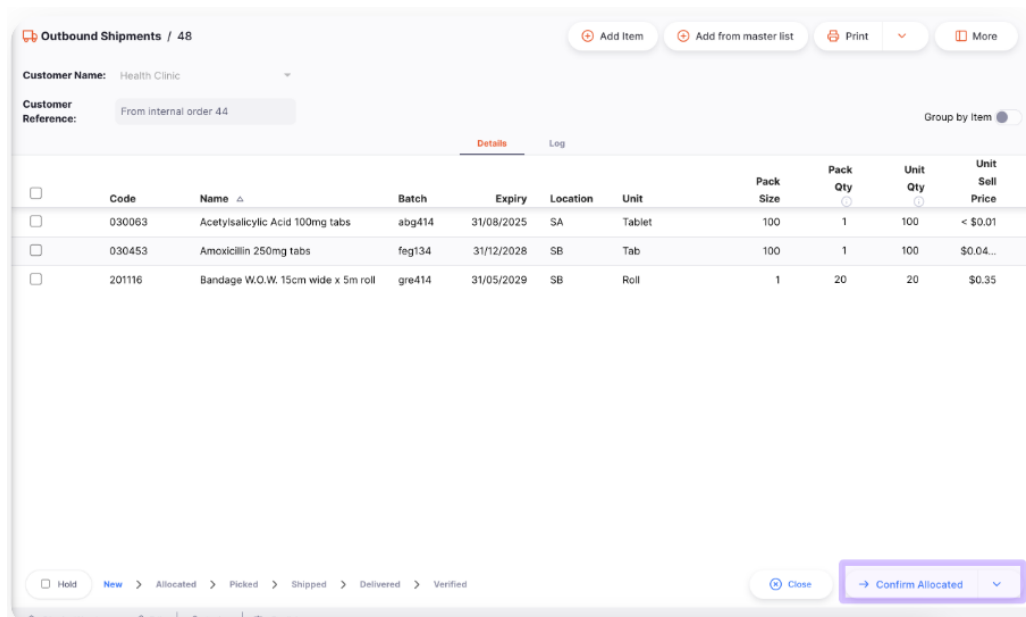
Sometimes you already know your stock is up to date, there's enough on hand to cover the request, and you want the system to allocate quickly and accurately using FEFO. In these cases, instead of manually allocating each line, you can simply tick the items and click **"Allocate placeholder lines."**



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

Step 4: Confirming the Allocation

Once you've allocated all the stock, select **Confirm Allocated**. At this point, the stock is deducted from your **available** stock on hand.



Trainer's Note:

Mention to participants that as soon as a batch is allocated (whether manually or automatically), that quantity is immediately reserved and removed from the store's available stock, even before you select **Confirm Allocated**.

This prevents the same stock from being accidentally used or allocated to another shipment at the same time.

Step 5: Picking and Packing

Once stock has been allocated, the next step is to physically pick the items from the shelves and pack them for delivery. This task is usually carried out by warehouse staff or the designated picker/packer.

In larger settings, the allocation is done first (usually by a supervisor or manager), and the picker uses a printed pick slip to locate and collect the right items. In smaller stores, the same person might allocate and pick the stock in one go.

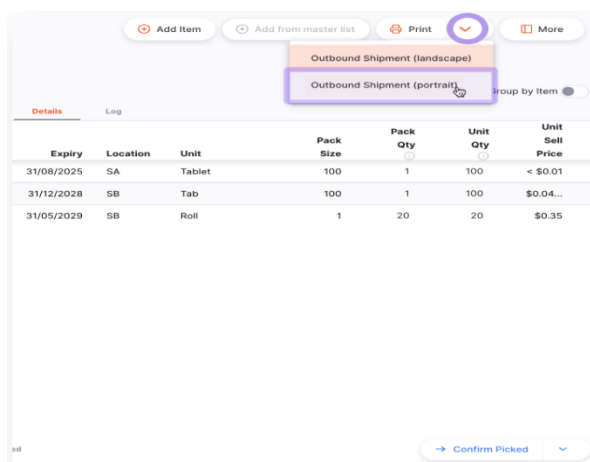
Either way, the goal is to ensure the correct items, batches, and quantities are picked and then packed for dispatch.

Step 6: Print a Pick Slip (Optional)

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

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

This pick slip includes batch, location, expiry, and quantity, and provides space to manually record how many units have actually been picked. This is especially useful in workflows where you want a physical record to double-check accuracy before dispatch.



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

Trainer's Note:

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

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

Step 7: Shipping the Delivery

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

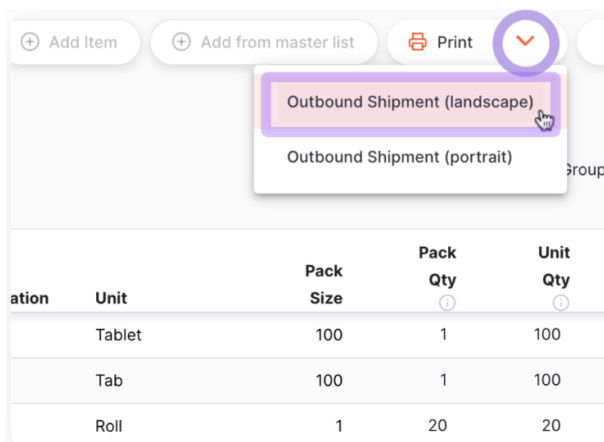
Trainer's Note:

Emphasize to participants that


- Once marked as **Shipped**, the customer can now receive the goods on their end and complete the process in their system.
- Once the order has been marked as **Shipped**, the item lines can no longer be edited or changed. This ensures stock records remain accurate and traceable.

Step 8: Print an Outbound Shipment Note

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



30/06/2025, 11:52 Outbound Shipments | Open mSupply



District Warehouse
 Phone:
 Email: districtwarehouse@opensupply.org

Outbound shipment

Customer:
 Health Clinic
 CHC

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

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

Page 1


<https://demo-opensupply.org/distribution/outbound-shipment/0197b59a-eb4b-7323-96a9-7704611b6a17?sort=itemName>

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

Activity 4: Returning Stock From Outbound Shipment

You may want to return stock, for example, if the customer rejected the shipment and it was returned.

Returning stock moves it back into your available inventory **without altering the locked shipment**, maintaining both accuracy and traceability.


Outbound Shipments / 48

Add Item

Customer Name: Health Clinic

Customer Reference: From internal order 44

Details Log

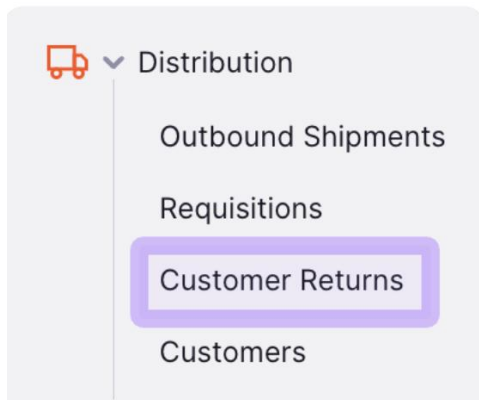
	Code	Name	Batch	Expiry	Location	Unit
<input checked="" type="checkbox"/>	030063	Acetylsalicylic Acid 100mg tabs	abg414	31/08/2025	SA	Tablet
<input checked="" type="checkbox"/>	030453	Amoxicillin 250mg tabs	feg134	31/12/2028	SB	Tab
<input checked="" type="checkbox"/>	201116	Bandage W.O.W. 15cm wide x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

3 Selected
 Delete
 Allocate placeholder lines
 Return selected lines

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

Trainer's Note:

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



Shipment is Delivered and Verified

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

What the customer does

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

What you will see

- In your Outbound Shipment invoice, the status will update automatically:
 - First to "**Delivered**".
 - Then to "**Verified**".
- You can track these changes even after you've already shipped the order.

Trainer's Note:

Explain to participants that this process helps you confirm that the shipment was received successfully and without issues.

Step 9: Conclude the session by asking if there are any questions. If no questions, appreciate the participants.

Session 19: Inbound Shipment

Session objectives:

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

1. Explain what an Inbound Shipment is in Open mSupply.
2. Describe the different stages of the Inbound Shipment process (Shipped → Delivered → Received → Verified).
3. Accurately record stock details during the inbound process (quantities, batches, expiry, locations).
4. Understand why shipments are held “On Hold” until confirmed.
5. Return stock correctly when necessary.

Time: 55 minutes

Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	Performing an Inbound Shipment	Lecturette/ group demonstration	30 minutes
2.	Returning Stock From An Inbound Shipment	Lecturette/ group demonstration	25 minutes
3.			

Trainer’s Note:

Welcome participants to this session. Appreciate them for been good participants since this course began.

Inform them that just like we did in previous session, we will be taking each topic in phases but as one process. Encourage them to be very attentive.

Start by asking participants to explain an inbound shipment. Allow a few responses, then continue by reading the Introduction below to participants.

An **Inbound Shipment** in Open mSupply is the process of receiving stock into your store from another facility.

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

It helps your store:

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

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

Activity 1: Performing an Indound Shipment

Step 1: Explain to participants that Inbound Shipments in Open mSupply help you receive stock accurately, track what's arrived, and confirm it into your inventory. This process ensures everything is accounted for and properly recorded before stock is used or issued.

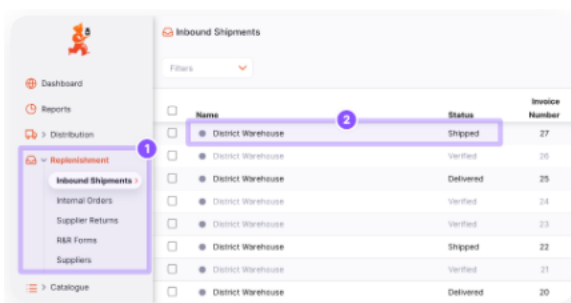
Performing an inbound shipment is divided into 4 stages:

Shipped → Delivered → Received (physical check) → Received (system entry) → Verified

Step 2: Tell participants that now we will discuss in detail the step-by-step stages for performing an inbound shipment. You may ask questions or seek clarification at any time.

Shipped – Step 1

The supplier has packed and shipped the goods to your facility. Once they mark the shipment as **Shipped**, the status for the Inbound Shipment will automatically update for your store.

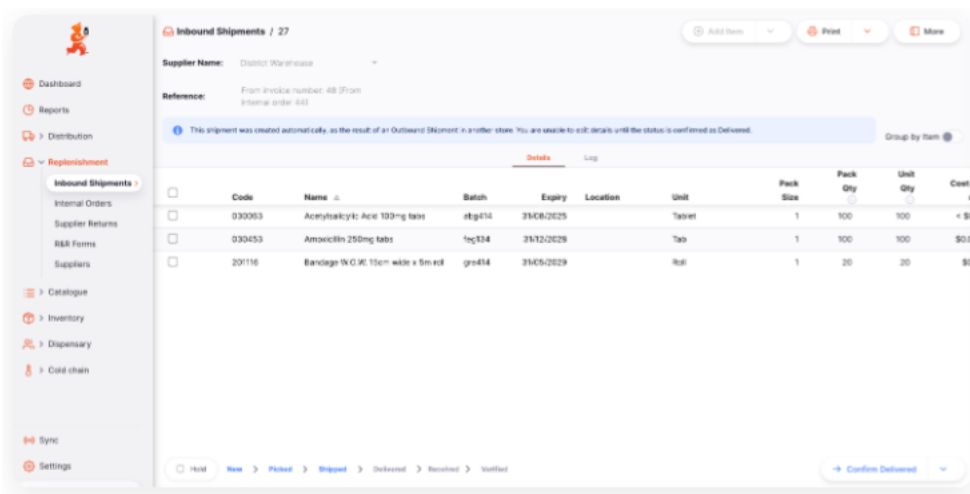


View a list of your **Inbound Shipments** and see the status updates in real time (2).

Trainer's Note: Inform participants that the **Shipped** status tells your store: *"Get ready — stock is on the way."* This allows you to begin the preparation for the incoming goods.

What you can do at this stage:

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



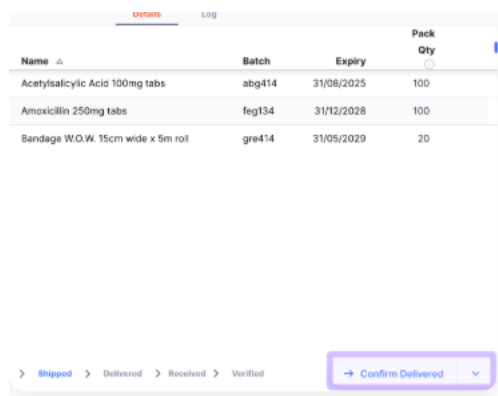
This Inbound Shipment has the status "**Shipped**" so it is pending arrival at the requesting facility.

Delivered – Step 2

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

What you need to do:

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



Once you click **Delivered**, the system unlocks the item lines for editing, allowing you to make any necessary adjustments to the received items. If you don't mark it as delivered, you won't be able to proceed to the next stage.

At this stage, the items are placed **on hold** in Open mSupply, meaning:

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

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

Trainer's Note:

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

Received – Step 3

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

Code	Name	Batch	Expiry	Location	Unit	Pack Size	Pack Qty	Unit Qty	Cost
030063	Acetylsalicylic Acid 100mg tabs	arg414	31/08/2025		Tablet	1	100	100	< 1
030453	Amoxicillin 250mg tabs	reg134	31/12/2028		Tab	1	100	100	\$0
201116	Bandage W/G/W 15cm wide x 5m roll	gre414	31/05/2028		Roll	1	20	20	\$

What you need to do:

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

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

2. Edit item lines if needed

Edit Item Line

Item: 030053 Acetylsalicylic Acid 100mg tabs
Unit: Tablet

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

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

Cancel OK OK & Next

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

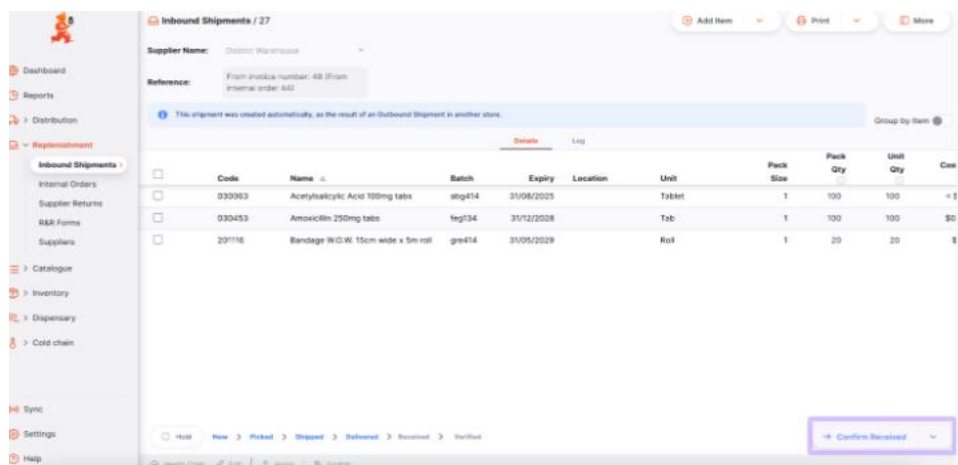
- Update quantities, batch numbers, and expiry dates to reflect what was actually delivered.
- This helps ensure your stock records are correct before finalising.
- You can also update the price or location for where you want to store your stock at this point by switching to the appropriate tab.

Trainer's Note:

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

Received – Step 4

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



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

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

Trainer's Note:

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

Verified- Step 4

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

What you need to do:

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

Verification ensures stock records are accurate and traceable, protecting against future changes or errors.

Trainer's Note:

Emphasize to participants that by following each step in order, your store maintains a **clear audit trail**, improves stock accuracy, and ensures everyone, from suppliers to staff, are aligned.

Step 3: Tell participants that we have successfully complete the inbound shipment process. Now let look at other aspect of the Inbound Shipment.

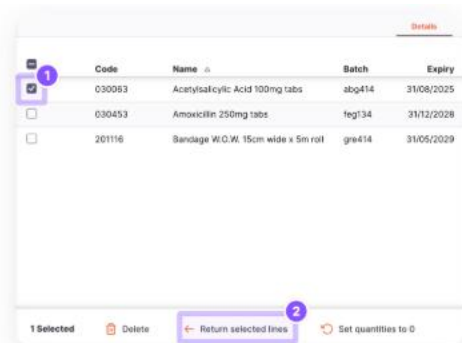
Activity 2: Returning Stock From An Inbound Shipment

Step 1: Ask participants if they have ever returned stock to a supplier. Allow a few responses. Then explain to them that sometimes, after reviewing a delivery, you may find that certain items need to be returned. For example, if the stock is damaged, expired, or simply not needed.

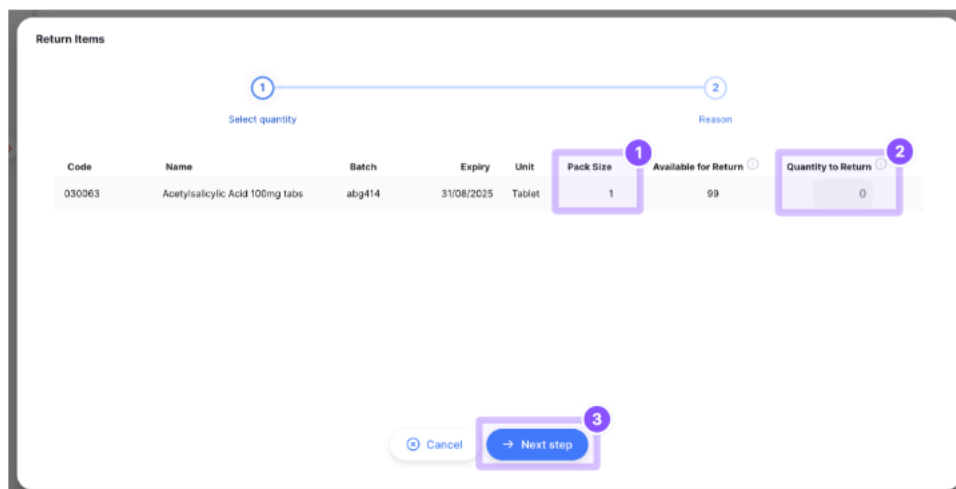
After the stock has been received into the store, you may want it to be returned.

To return stock from an Inbound Shipment:

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



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

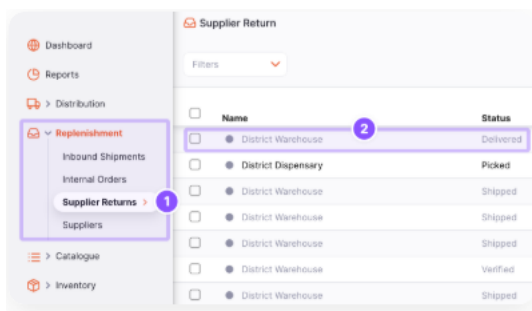


How to return:

1. Check the pack size. In this example, the pack size is 1, so each pack is made of 1 tablet.
2. Type how many packs to return. In this case, if you want to return 10 tablets, type 10 in the “Quantity to return” field.

*Participants to Note, If the **pack size** was **30**, typing 10 in the "Quantity to return" field would return 300 tablets.*

3. Select "**Next Step**". You will be asked why you are returning it. Select a reason for the return. After this step, the system will automatically generate a return to the supplier. You can refer back to the Return note that is created by looking at your **Supplier Returns (1)**.



Trainer’s Note: Tell participants that for suppliers to receive this return, they will find the return note in the "Customer Returns" on their system. This will be discussed in the next **Session: Returns**.

Step 2: Conclude the session by asking if there are questions. If no questions, appreciate the participants.

Session 20: Returns

Session objectives:

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

1. Explain the purpose of returns in Open mSupply.
2. Differentiate between manual returns, customer returns, and supplier returns.
3. Demonstrate how to process both customer and supplier returns.
4. Apply best practices for handling returns to maintain accountability and stock integrity.
5. Understand how inbound and outbound shipment returns are managed in the system.

Time: 50 minutes

Session Outline/Activity

No.	Activity	Facilitation Method	Time Allotted
1.	What are Returns?	Lecturette	10 minutes
2.	Customer Vs Supplier Returns	Lecturette/ group demonstration	20 minutes
3.	Inbound and Outbound Shipment Returns	Lecturette/ group demonstration	20 minutes

Activity 1: What are Returns

Step 1: At this point, all trainers should give participants a **standing ovation for 1 minute** for their wonderful participation so far.

Step 2: Tell them we will now be looking at Returns in Open mSupply. Ask the participants if any of them can explain “**what is Returns**”.

Step 3: After a few attempts by the participants, use the information in the trainers box to explain further.

Trainer’s note:

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

Step 4: Now that they know what Returns is, ask participants to give reasons why **Returns** happen. Allow a few comments, then inform them that :

Returns can happen for many reasons:

- Overstock or unused items
- Damaged or expired goods

- Incorrect deliveries
- Program recall or redistribution

Why Returns Matter

Handling returns correctly ensures that:

- Returned stock is tracked properly
- Inventory levels are accurate
- Damaged or expired items are not reused

You maintain an audit trail for compliance and safety

Activity 2: Customer vs Supplier Returns

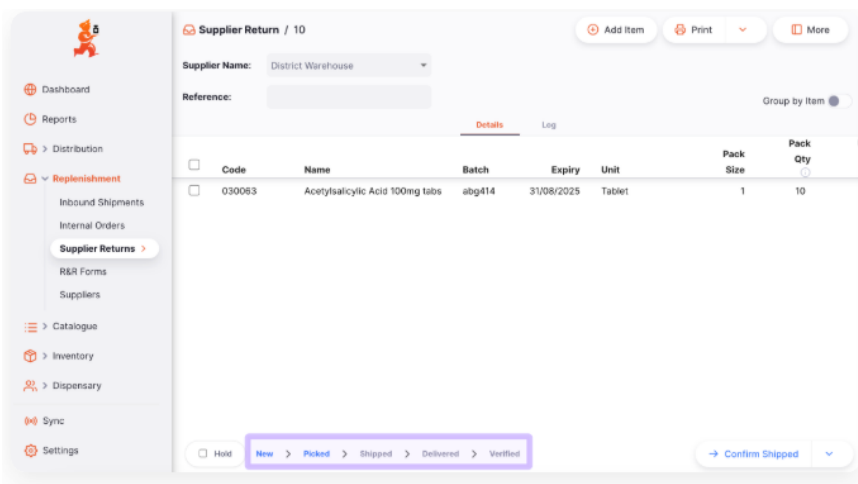
Type	When to Use	Stock Movement
Customer Return	A facility returns stock back to you	Stock comes into your store
Supplier Return	You send stock back to a supplier	Stock goes out of your store

Step 1. Inform participants that we have two types of Returns as seen in the table above. Allow 5 minutes for participants to study the table and ask questions.

Step 2: Let's look at the "Returns" in details.

Manual Returns

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



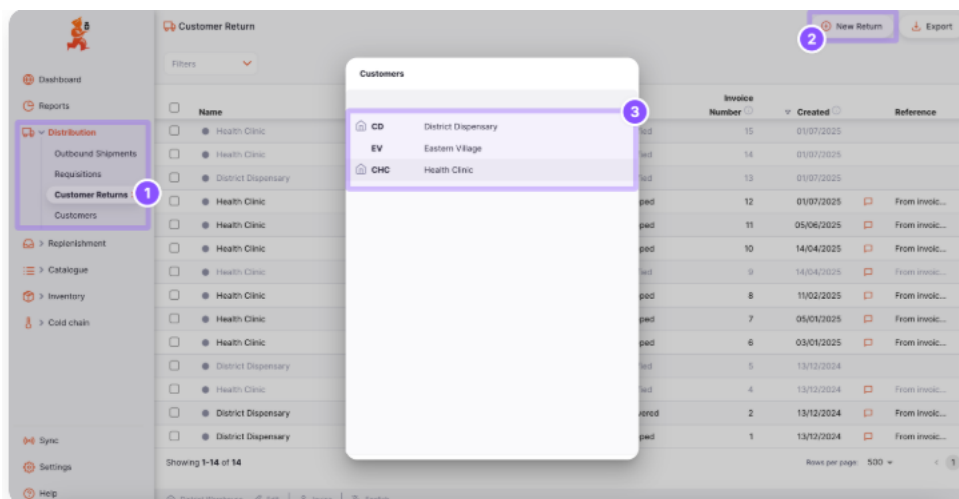
Customer Returns

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

This usually happens when:

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

Processing a Customer Return



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

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

Return Items

Item: 030063 Acetylsalicylic Acid 100mg tabs

Quantity: 1 Reason: 2

1 Add batch (+)

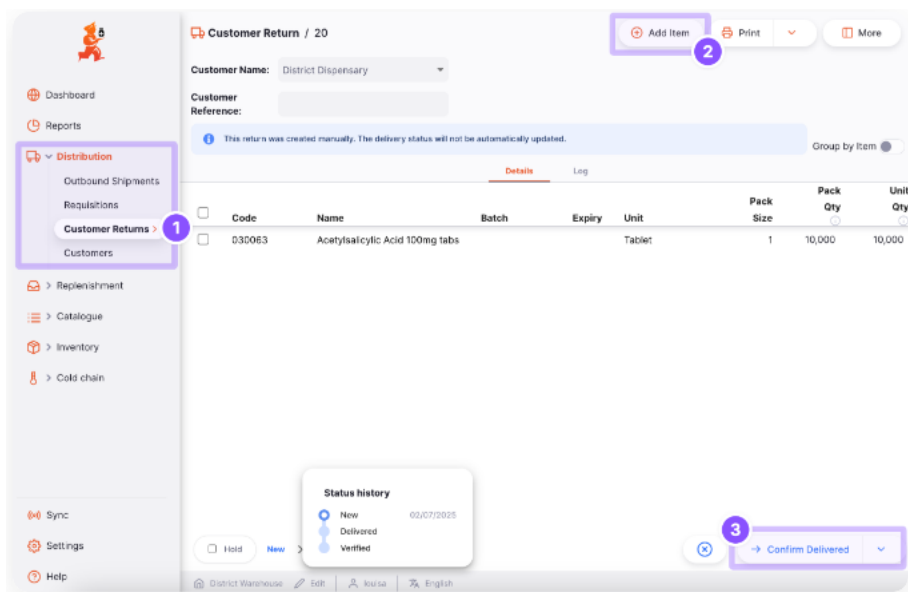
Code	Name	Batch	Expiry	Pack Size	Quantity Returned
030063	Acetylsalicylic Acid 100mg tabs	1	DD/MM/YYYY	100	0

2

3

Cancel Next step OK & Next

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



Best Practices for Customer Returns

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

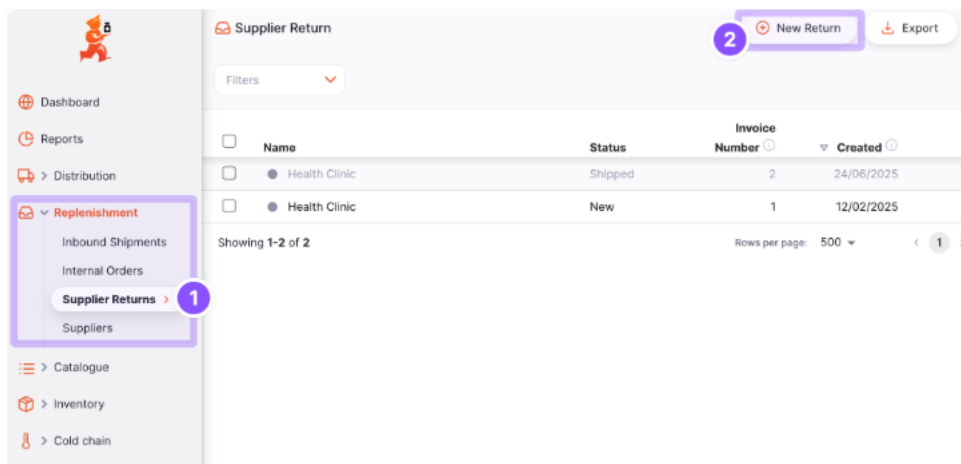
Supplier Returns

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

This happens when:

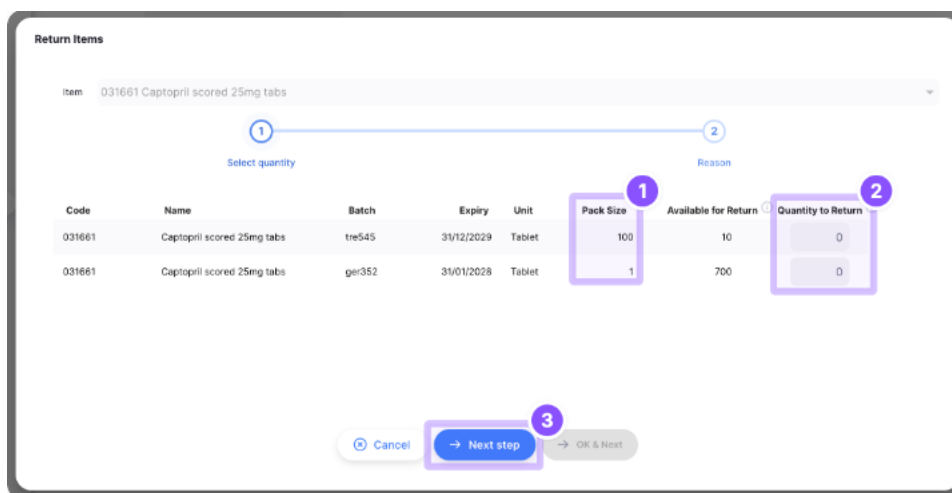
- You received damaged, incorrect, or expired goods
- There is an item recall from the supplier
- There was a duplicate shipment or excess supply

Processing a Supplier Return



Replenishment → Supplier Returns → New Return → Select the **Supplier** (this is the store or company you're returning the stock to)

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



1. Look for the stock line with the matching batch, expiry and **pack size** that you want returned.
2. Enter Quantity to Return
 - In the **Quantity to Return** field, enter how many packs you're returning for the selected batch.
 - You can only return up to the amount shown in "**Available for Return.**"
 - The system will automatically calculate based on the pack size, so double-check the pack size column to ensure you're returning what you intend.
3. Select "Next Step"

- After entering the quantity, select **Next Step** to select a reason for the return (e.g., damaged, incorrect batch, short expiry) and confirm the return.
4. Review Stock Adjustment and update the status to **"Picked"**.
- When items are in your Supplier Returns but the status is **"New"**, the items are removed from your "Available SOH".
 - Once the status has been set to **"Picked"**, stock is removed from your inventory (or your Total SOH).
 - Once you are finished reviewing and do not want any further changes made, update the status to **"Verified"** to finalise the return note.

Best Practices for Supplier Returns

- Use correct batch and expiry info to avoid errors
- Communicate with supplier to align expectations
- Track returns for reporting and reconciliation

Activity 3: Inbound and Outbound Shipment Returns

Step 1: Inform participants that when returns are made directly from **Inbound** or **Outbound Shipments**, Open mSupply automatically creates a **return reference note** linked to that shipment.

This ensures:

- There's a clear history of what was returned and why
- The return is traceable back to the original shipment (either sent or received)
- You can review and audit return activity at any time

These return reference notes appear in the **Returns** section of the system, helping users maintain full visibility over adjustments made after shipping or receiving.

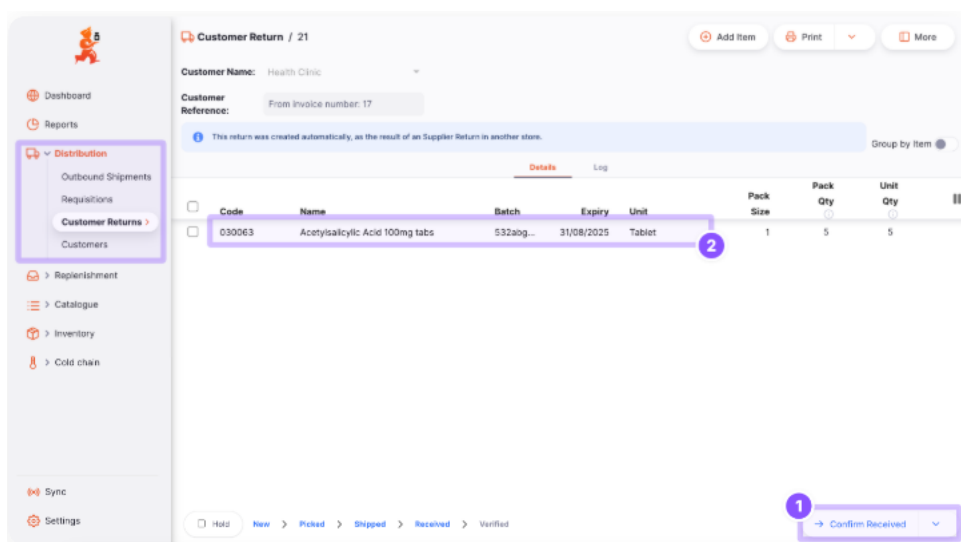
Step 2: Refer participants to the table below for more information on the types of Returns. Give clarifications where needed.

Return Type	Where to View the Return Record
Inbound Shipment Return	Supplier Returns
Outbound Shipment Return	Customer Returns

i To see more about how to create Inbound or Outbound returns, see the Returns chapter in the previous lessons: **"Inbound Shipment"** or **"Outbound Shipment"**.

Activity 4: Receiving Customer Return

Step 1: Explain to participants that when a mSupply store sends stock back to your store, it will appear in your system if the return was automatically created (e.g., the customer made an Inbound Shipment Return or a Supplier Return to you).



To receive an automatically generated return from a customer that is also using mSupply, go to **Customer Returns** to find the return, then proceed with the steps described below.

Step 2: Explain to participants how to process a Customer Return.

To process the Customer Return:

1. Select **Confirm Received**

- Once the physical stock arrives at your store, select **Confirm Received**. This step updates the return status and allows you to make edits to the item lines. Until this is done, the line details will remain locked and uneditable.

***Participants should note that,** Selecting **Confirm Received** also brings the items directly into your available stock on hand. If the return was due to quality concerns, make sure to verify the return immediately and either remove the item or move it to a **Hold** location to prevent it from being used.*

2. Edit and Verify

- Review the returned item details — such as batch number, expiry date, and quantity. If everything is correct, select **Confirm Verified** to complete the return.

***Participants should note that,** this process ensures the returned stock is officially received into your inventory and is accurately reflected in your stock records. It also maintains a clear audit trail across both stores involved in the return.*

Step 3: Conclude the session by asking if there are any questions. If no questions, appreciate the participants.