

# Chapter 6

## Suppliers

### **This chapter—**

- Familiarizes the user with how to—
  - View details of suppliers
  - Add, amend, and delete details of a supplier
  - Print a list of suppliers
- Explains how RxSolution can be used to manage suppliers



## Working with Supplier Data

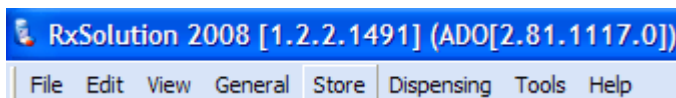
### *What Is a Supplier?*

A supplier is any facility (e.g., manufacturer, wholesaler, distributor, depot) from which pharmaceutical supplies are purchased or obtained. In most cases, public health facilities (e.g., hospitals, health centers) obtain their stock from state-owned provincial depots.

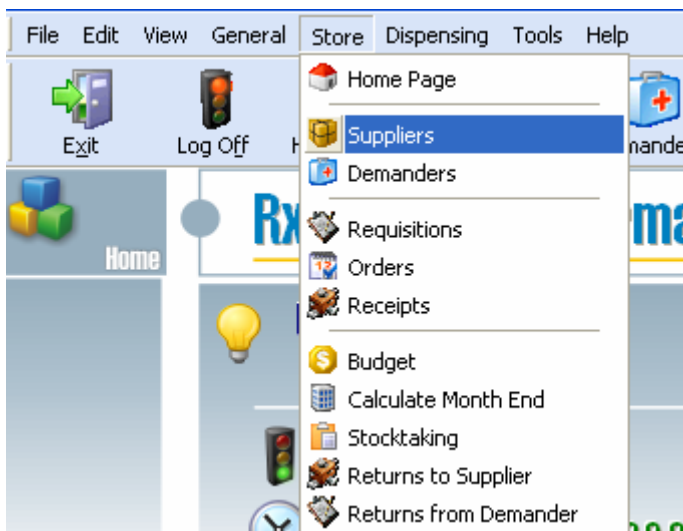
### *How Do I Get to the Suppliers Screen?*



1. Click on the **Suppliers** icon on the toolbar.
2. Alternatively, you can click on **Store** on the menu bar.



3. Then choose **Suppliers** from the drop-down menu.



## What Does the Suppliers Screen Look Like?

The screenshot displays the RxSolution 2008 [1.2.2.1491] (ADO[2.81.1117.0]) window. The top menu bar includes File, Edit, View, General, Store, Dispensing, Tools, and Help. The toolbar contains icons for Exit, Log Off, Home Page, Products, Demanders, Suppliers, Requisitions, Orders, Receipts, Prescribers, Dispensers, Patients, Prescriptions, and Down Referral.

The main window is divided into two panels. The left panel, titled **SUPPLIERS (Active)**, shows a list of suppliers with columns for Code and Name. The right panel, titled **Details**, shows information for the selected supplier, **Depot Pharmaceutical**. The details panel includes fields for Name, Code, Short, and Active status. Below this is the **Main Contact** section with fields for Name, Phone, and Fax. The **Transactions** section shows a table of transactions with columns for From, To, Description, Ordered, Received, Max Item Cost, and Total Cost.

From	To	Description	Ordered	Received	Max Item Cost	Total Cost
01/04/2007	31/03/2008	Acetazolamide 250mg Tablet; 20 Tablet [PO]	300	200	R 6.09	R 1,218.00
3055	DIS	Acetic Acid (Glacial) 1% Liquid, External; 500 ml	164	164	R 8.89	R 474.71
3054	DIS	Acetone BP Liquid, External; 500 ml	12	12	R 7.46	R 89.41
0767	DIS	Acetylcysteine 200mg/ml Ampoule; 10ml ml [INJ]	45	90	R 9.59	R 849.40
0169	DIS	Aciclovir 200mg Tablet; 25 Tabs Tablet [PO]	700	655	R 7.18	R 4,510.75
1947	REG	Aciclovir 250mg Vial; 1 Vial [INJ]	68	99	R 42.40	R 4,140.00
0599	DIS	Aciclovir 3% Eye Ointment; 4 gm [OPHTH]	261	113	R 150.00	R 3,750.88
1977	DIS	Aciclovir 5% Cream; 2 gm [TOP]	256	226	R 3.18	R 718.68
0857	PHC	Actraphane 100U/ml (30/70) Vial; 10ml ml [SC]	3411	3411	R 36.69	R 122,273.59
2131	PHC	Actraphane NM (ye) 100U/ml (30/70) PenSet; 3 ml [SI]	750	750	R 20.66	R 15,250.00
2982	PHC	Adrenaline 1/1000 Ampoule; 1 ml ml [IV]	1500	1500	R 0.91	R 1,343.00
2313	REG	Albumin, Human 20% Bottle; 100 ml	773	483	R 378.83	R 182,974.89
2848	REG	Albumin, Human 4% Bottle; 200 ml	153	40	R 196.27	R 7,850.80
3064	DIS	Alcohol 96% Liquid, External; 20 Litre	100	100	R 180.91	R 7,507.60
0770	DIS	Alfentanil 0.5mg/ml Ampoule; 2 ml [INJ]	500	400	R 26.59	R 10,636.00
2876	PHC	Allopurinol 100mg Tablet; 28 Tablet [PO]	340	340	R 3.21	R 1,065.40
0111	PHC	Allopurinol 300mg Tablet; 30 Tablet [PO]	480	480	R 6.57	R 3,153.60
0775	REG	Altracurium Besylate 10mg/ml Ampoule; 2.5 ml [INJ]	332	482	R 30.74	R 14,816.68
0493	DIS	Alu-Hydroxide 300mg/5ml Suspension; 350 ml [PO]	388	66	R 6.56	R 432.96
3953	DIS	Alu-Hydroxide, Mg-Triitol 250mg/500mg Tablet; 24 Tabl	3616	3146	R 4.70	R 12,396.20
0002	REG	Amikacin 250mg/ml Vial; 2ml ml [INJ]	52	150	R 6.42	R 875.10
0003	DIS	Amikacin 50mg/ml Vial; 2ML ml [INJ]	290	478	R 7.47	R 2,992.76
0772	PHC	Aminophylline 25mg/ml Ampoule; 10 ml [IV]	800	400	R 1.02	R 408.00
0116	DIS	Amiodarone 200mg Tablet; 30 Tablet [PO]	200	200	R 31.80	R 6,082.58
2621	REG	Amiodarone 50mg/ml Ampoule; 3 ml [INJ]	50	50	R 50.93	R 2,546.50
2146	PHC	Amitriptyline 25mg Tablet; 28 Tablet [PO]	807	407	R 2.04	R 829.78
0118	DIS	Amitriptyline 25mg Tablet; 500 Tablet [PO]	1	1	R 23.00	R 23.00
3622	PHC	Amitriptyline 25mg Tablet; 84 Tablet	400	300	R 4.27	R 1,246.00
0119	DIS	Amlodipine 5mg Tablet; 30 Tablet [PO]	230	230	R 16.79	R 3,860.00
0011	PHC	Amoxicillin 125mg/5ml Suspension; 100 ml [PO]	8679	3179	R 3.12	R 8,786.91
						R 6,824,777.43

The bottom of the transaction table shows a summary of Completed and Outstanding transactions.

The **Suppliers** screen is in two parts. A list of all the suppliers, with codes and names, is displayed on the left-hand side of the screen. Information about the supplier (e.g., main contact person, staff members, budget) is displayed on the right-hand side panel. More details on specific areas such as transactions are located on the tabs under the **Main Contact** information.




The navigation buttons are at the top of the panel on the left-hand side.

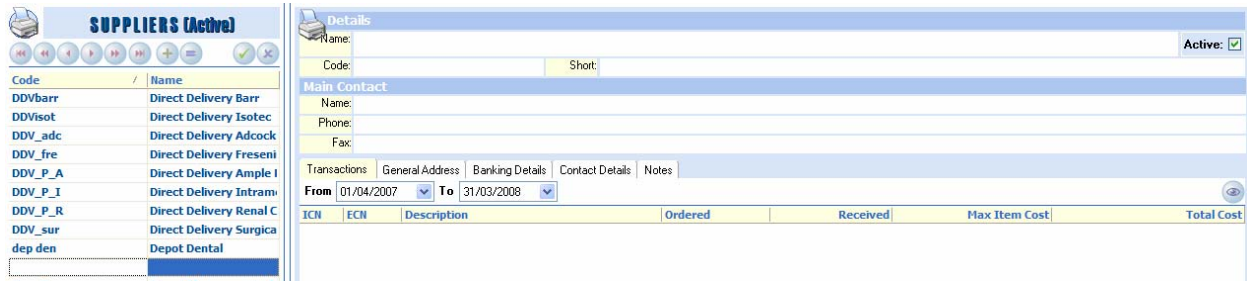


For a description of these buttons and their functions, see chapter 3, “Understanding the Features and Navigation.” The screen can be customized using the filters, groupings, and sorting described in chapter 3.

## Using RxSolution to Manage Supplier Data

### How Do I Add a Supplier?

1. Click on the add a new record icon . If the  icon is not visible, it means that the logged in user does not have access as set up in User admin.  User Admin
2. A blank supplier form appears—



**SUPPLIERS (Active)**

Code	Name
DDVbarr	Direct Delivery Barr
DDVisot	Direct Delivery Isotec
DDV_adc	Direct Delivery Adcock
DDV_fre	Direct Delivery Freseni
DDV_P_A	Direct Delivery Ample I
DDV_P_I	Direct Delivery Intram
DDV_P_R	Direct Delivery Renal C
DDV_sur	Direct Delivery Surgica
dep den	Depot Dental

**Details**

Name:  Code:  Short:  Active: ☒



**Main Contact**

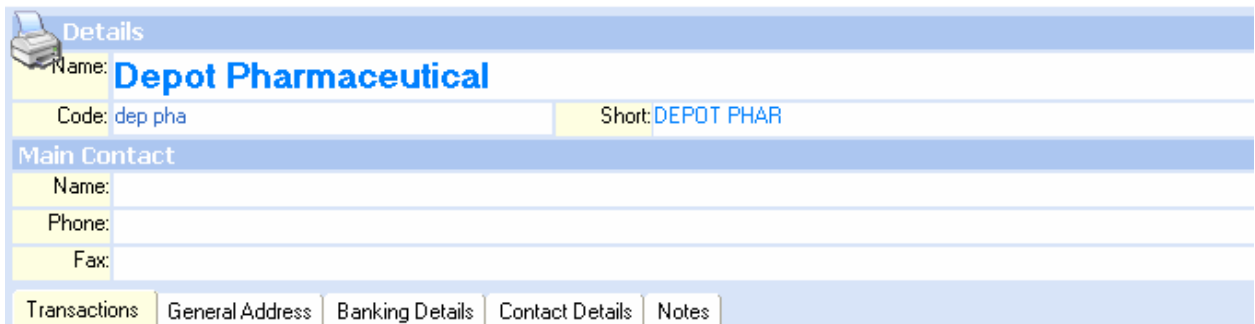
Name:  Phone:  Fax:

Transactions | General Address | Banking Details | Contact Details | Notes

From: 01/04/2007 To: 31/03/2008

ICN	ECN	Description	Ordered	Received	Max Item Cost	Total Cost
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3. By default, the supplier will be marked as **Active** . A checked box activates the supplier, allowing it to be seen on the supplier list and on reports. If the box is not checked, the new supplier will not be created.
4. Click in the appropriate box to type in the **Name**, **Code**, and the **Short** name (if applicable) of the supplier on the right-hand side of the screen.
5. Type in the **Name**, **Phone**, and **Fax** details of the supplier's **Main Contact** person.
6. Click on the save button  to the right of the navigation buttons.
7. You may enter additional information about the supplier in the **General Address**, **Banking Details**, **Contact Details**, and **Notes** tabs.



**Details**


Name: **Depot Pharmaceutical** Code: **dep pha** Short: **DEPOT PHAR** Active: ☒

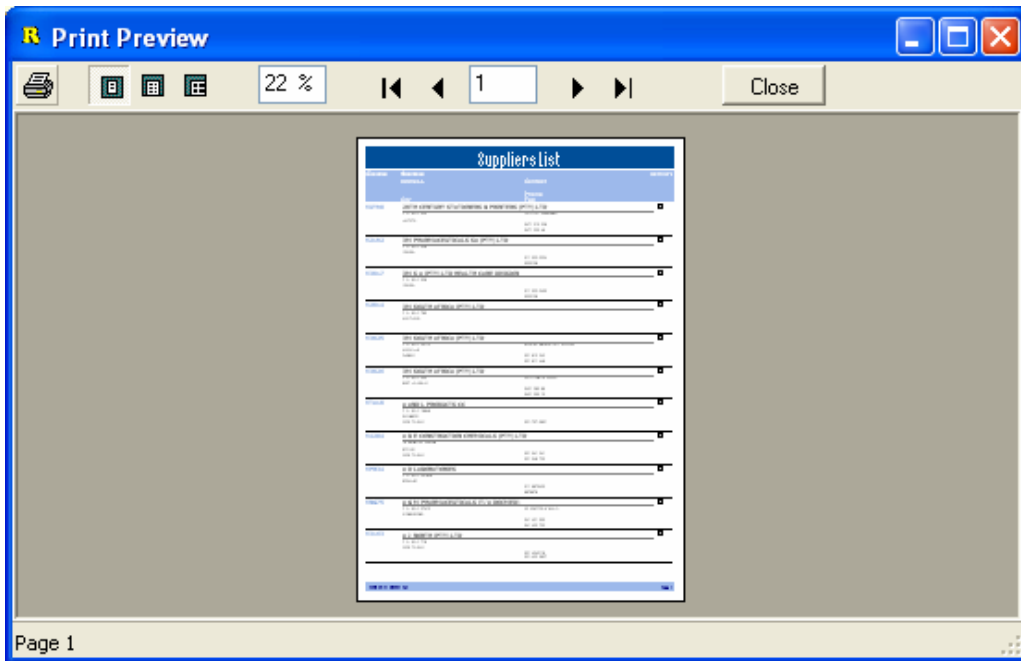
**Main Contact**

Name:  Phone:  Fax:

Transactions | General Address | Banking Details | Contact Details | Notes

### How Do I Print a List of Suppliers?

1. Click on the printer icon  on the top left-hand corner of the **Suppliers** screen.
2. A preview of the **Suppliers List** will be displayed.



3. To print this list, select the printing option to print to an installed printer or to print to a file (a copy of the list will be printed as a file that can be saved on the computer). (See chapter 25, "Reports," for a detailed description of printing to a file.)
4. Follow the normal procedure for printing a document.

### How Do I View or Add Details of a Supplier?

Additional details of a supplier can be viewed or added at these five tabs—

- **Transactions**
- **General Address**
- **Banking Details**
- **Contact Details**
- **Notes**

#### Transactions Tab

1. Click on the **Transactions** tab to view a detailed list of transactions with the supplier (see screen below).

**Details**

Name: **Depot Pharmaceutical** Active: ☒

Code: dep pha Short: DEPOT PHAR

**Main Contact**

Name:

Phone:

Fax:

Transactions General Address Banking Details Contact Details Notes

From 01/04/2007 To 31/03/2008

ICN	ECN	Description	Ordered	Received	Max Item Cost	Total Cost
3294	PHC	Acetazolamide 250mg Tablet; 20 Tablet [PC]	300	200	R 6.09	R 1,218.00
3055	DIS	Acetic Acid (Glacial) 1% Liquid, External; 500 ml	164	164	R 8.89	R 474.71
3054	DIS	Acetone BP Liquid, External; 500 ml	12	12	R 7.46	R 89.41
0767	DIS	Acetylcysteine 200mg/ml Ampoule; 10ml ml	45	90	R 9.59	R 849.40
0169	DIS	Aciclovir 200mg Tablet; 25 Tabs Tablet [PO]	700	655	R 7.18	R 4,510.75
1947	REG	Aciclovir 250mg Vial; 1 Vial [INJ]	68	99	R 42.40	R 4,140.00
0599	DIS	Aciclovir 3% Eye Ointment; 4 gm [OPHTH]	261	113	R 150.00	R 3,750.88

The **Transactions** tab lists all the transactions from the selected supplier between two specified dates. **Completed** and **Outstanding** transactions are on separate subtabs, which can be selected at the bottom of the screen

The lists include the products that were ordered by their code and description, the date ordered, the date received, the maximum item cost, and the total cost. The total value of receipts for the financial year determined by the date filter is displayed at the bottom right-hand corner of the list.

Transactions General Address Banking Details Contact Details Notes

From 01/04/2007 To 31/03/2008

ICN	ECN	Description	Ordered	Outstan...	Item Cost /	TOTAL	Order No.
3601	PHC	Aqueous BP Cream; 100 gm [TOP]	400	47	R 1.21	R 56.87	TC/07-09-0116
3972	PHC	Levonorgestrel , Ethinyl Estradiol, Triphasic (Triphasil) 75/125/50mcg Tablet; 28 Tablet	2000	1800	R 4.22	R 7,596.00	TC/07-09-0116
3970	PHC	Nordette 0.15mg/0.03mg Tablet; 28 Tablet [PO]	1000	900	R 4.61	R 4,149.00	TC/07-09-0116
3911	DIS	Oxytocin 5IU Ampoule; 1 ml [INJ]	200	100	R 5.25	R 525.00	TC/07-09-0116
3598	DIS	Vitamins, Multi . Drop, Oral; 25ml ml [PO]	96	4	R 12.52	R 50.08	TC/07-09-0116
2037	REG	Vitamin K1 (Phytomenadione) 10mg Tablet; 10 Tablet [PO]	10	1	R 34.77	R 34.77	TC/07-09-0116
3906	DIS	Obidoxime 250mg/ml Ampoule; 1 ml [IV]	15	15	R 46.79	R 701.85	TC/07-09-0116
3105	REG	Amphotericin B 10mg Lozenges; 20 Tablet [PO]	60	60	R 50.00	R 3,000.00	TC/07-09-0116
3142	DIS	Vitamin D (Calciferol) 50.000U Tablet; 100 Tablet [PO]	2	2	R 117.61	R 235.22	TC/07-09-0116
1066	DIS	Meglumine Diatrizoate & Sod. Inj 60% Bottle; 100 ml [IV]	2	2	R 137.98	R 275.96	TC/07-09-0116
3925	REG	Hydroxyurea 500mg Tablet; 100 Tablet [PO]	3	3	R 147.00	R 441.00	TC/07-09-0116
1056	PHC	Tuberculin PPD Test Device Dried (Biocine-Test-PPD) BP Diagnostic Agent; 20 Test	3	3	R 158.01	R 474.03	TC/07-09-0116

R 17,539.78

Completed Outstanding

By default, the period of transactions listed corresponds to issues posted for the financial year to date (FYTD). The period can be changed by selecting a different range of dates.

- To change the date, click on the arrow next to the **From** or **To** date field, and click on the date required.

From 2004/02/02 To 2004/02/27

Code	February 2004						
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
040865							P Paste; 4
K71345	25	26	27	28	29	30	31
F01960	1	2	3	4	5	6	7
E25160	8	9	10	11	12	13	14
	15	16	17	18	19	20	21
	22	23	24	25	26	27	28
	29	1	2	3	4	5	6
	Today: 2004/10/17						

### General Address Tab

Click on the **General Address** tab to view, enter, or edit the supplier's general address details.

General Address details	
PO Box:	
Suburb:	City:
Code:	Country:
Physical Address details	
Address:	
Suburb:	City:
Code:	Country:
Payment Address details	
Address:	
Suburb:	City:
Code:	Country:

### Banking Details

Click on the **Banking Details** tab to view, enter, or edit supplier banking details. If the purchase orders are placed in a foreign currency, enter the currency in the **Currency** field. **EDI** stands for Electronic Data Interchange.

Transactions	General Address	Banking Details	Contact Details	Notes
<b>Banking details</b>				
Branch:				
Acc No:				
Type:	EDI: <input type="checkbox"/>			
Currency:				



## Contact Details

Click on the **Contact Details** tab to view, enter, or edit contact details for additional personnel of a supplier.

Transactions   General Address   Banking Details   <b>Contact Details</b>   Notes							
First Name	Last Name /	Initials	Pos	Cell Phone	Phone	Fax	E-Mail
William	Rooster	WFR	Account Query	098342555	2334566	2344566	wrooster@DDAR.com
Vernon	Taylor	VWT	Order Clerk	098346321	2334567	2344566	

## Notes

Click on the **Notes** tab to enter additional notes regarding a supplier, as in the example below—

Code: DDV\_P\_A Short: DDV\_P\_AMPL

**Main Contact**

Name: Rodger Da Silver


Phone: 90990987

Fax: 2344566


Transactions | General Address | Banking Details | **Contact Details** | Notes


Return Items to supplier 3 Months Before Expiry with relevant Invoice Numbers

## How Do I Print the Supplier Information Contained on a Tab?

1. Select the supplier whose information is required.
2. Click on the tab containing the required information.
3. Click on the printer icon  at the top left of the right-hand window.
4. Follow the usual procedure to print a document.

## How Do I Select Which Supplier Records to Display?

The apply filter button  allows users to select active, inactive, or all suppliers. An active supplier is one that is still being used by the institution, and an inactive supplier is one that no longer is used by the institution.

1. Click on the apply filter button .
2. A drop-down list will appear—



3. Click on the option desired.
4. A check mark (✓) appears next to the currently selected option. The selected option will also be displayed next to the **SUPPLIERS [Active]** label at the top of the browse window as below—



### *How Do I Sort My Supplier Records?*

The suppliers list can be sorted by **Code** or by **Name** in ascending (A–Z) or descending (Z–A) order.

1. Click on the word **Code** or **Name**.



2. A triangular arrow will appear next to the word that was selected. A triangle that points upward means that the records are sorted in ascending order. A triangle pointing downward indicates records that are sorted in descending order.



Code	Name
908765	Argott Pharmaceuticals
0001	Supplier 1

- To change the sort order, click on **Code** or **Name** again and the order changes.



Code	Name
0001	Supplier 1
908765	Argott Pharmaceuticals

### How Do I Search for a Supplier?

- Click on the yellow field of either **Code** or **Name**.



Code	Name
0001	Supplier 1
908765	Argott Pharmaceuticals



- Type the code or name that that you are looking for. As the code or name is typed, the list jumps to the matching record.



Code	Name
0001	Supplier 1
908765	Argott Pharmaceuticals




*Note:* When records cannot be found, the cause is often a spelling mistake.

### How Do I Edit the Details of a Supplier?

1. Click on the required field where changes have to be made.
2. Make the desired changes.
3. Click on the save icon  to save the changes.
4. If you want to cancel changes, click on the cancel changes button .

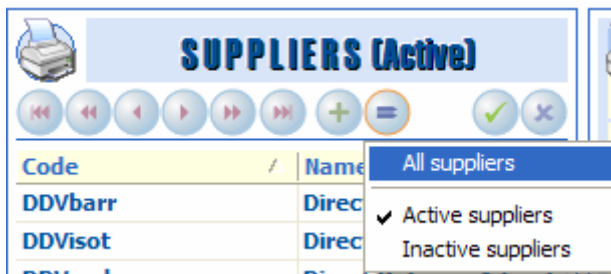
*Note: Changes can be cancelled only before they are saved.*



### How Do I Delete a Supplier?

1. You cannot delete a supplier. Instead, a supplier is marked as inactive. Highlight the supplier that you wish to mark as inactive.
2. Click on the **Active** checkbox . This will remove the check mark .
3. Click on the save button . The supplier will disappear from the list of active suppliers and will not be available for use in purchase orders.

### How Do I Return a Supplier to an Active State?

1. Choose **All suppliers** from the filter drop-down list.



2. The inactive suppliers will now also be visible. Click on the supplier you wish to activate.
3. Click in the **Active** check box .
4. Click on save .
5. Change the filter selection back to **Active suppliers**.