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

6-2

Working with Supplier Data

What Is a Supplier?

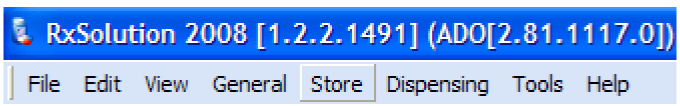
A supplier is any facility (e.g., manufacturer, wholesaler, distributor, depot) from which pharmaceutical supplies are purchased or obtained. In most cases, public health facilities (e.g., hospitals, health centers) obtain their stock from state-owned provincial depots.

How Do I Get to the Suppliers Screen?

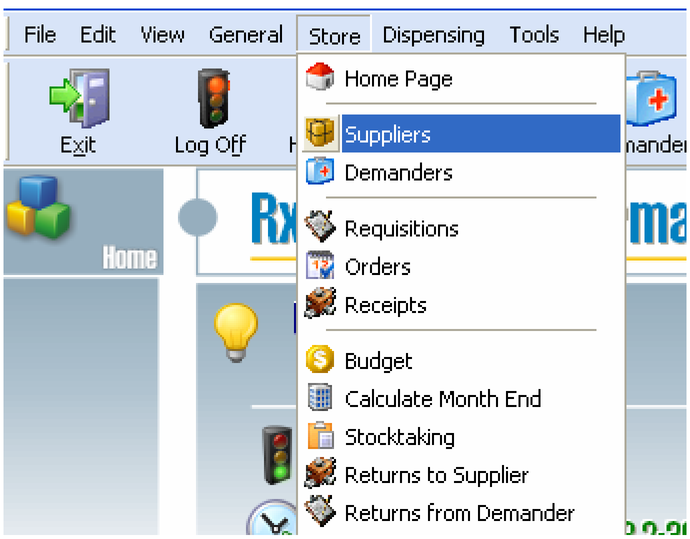
1. Click on the **Suppliers** icon 

on the toolbar.

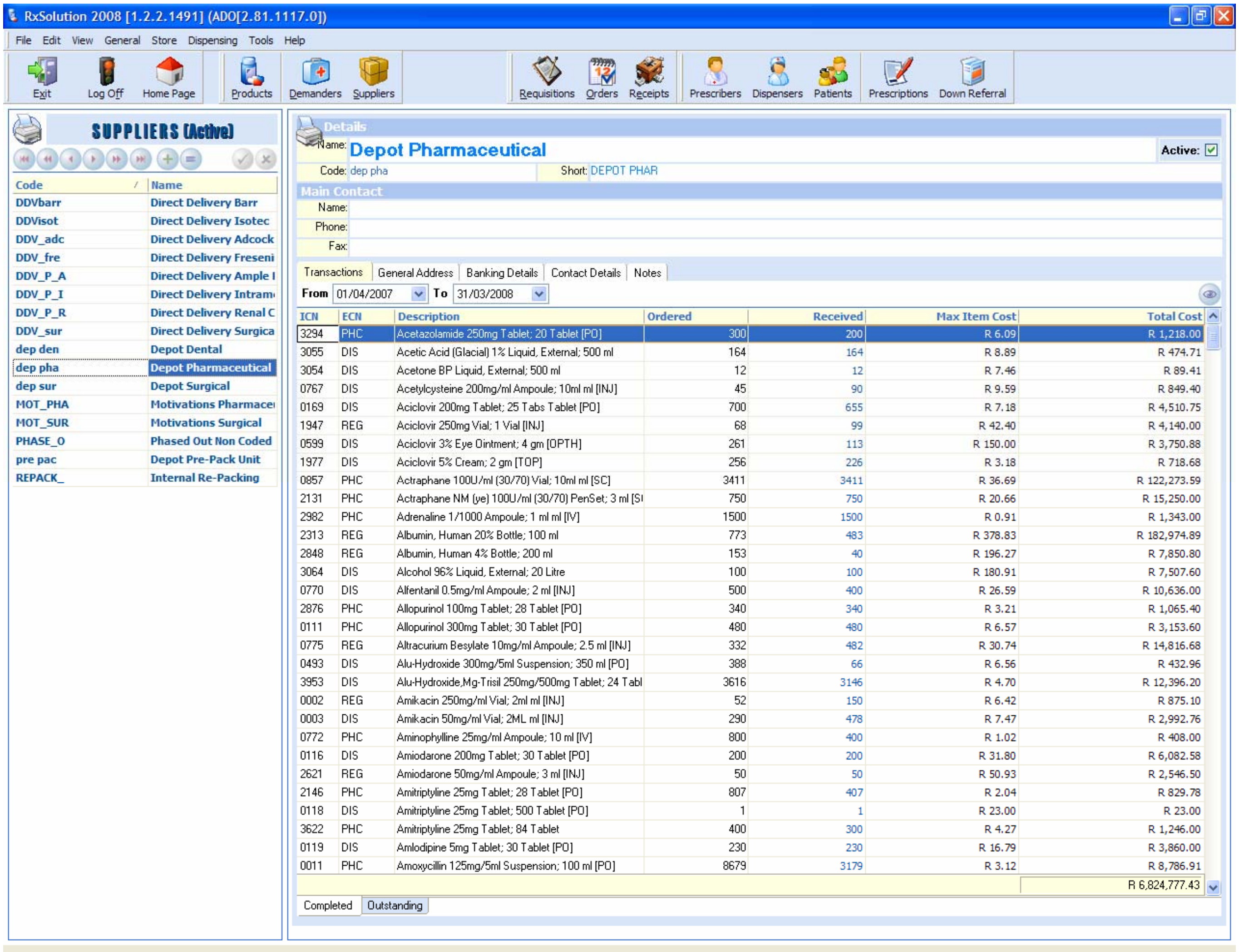
2. Alternatively, you can click on **Store** on the menu bar.



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



What Does the Suppliers Screen Look Like?



The **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.

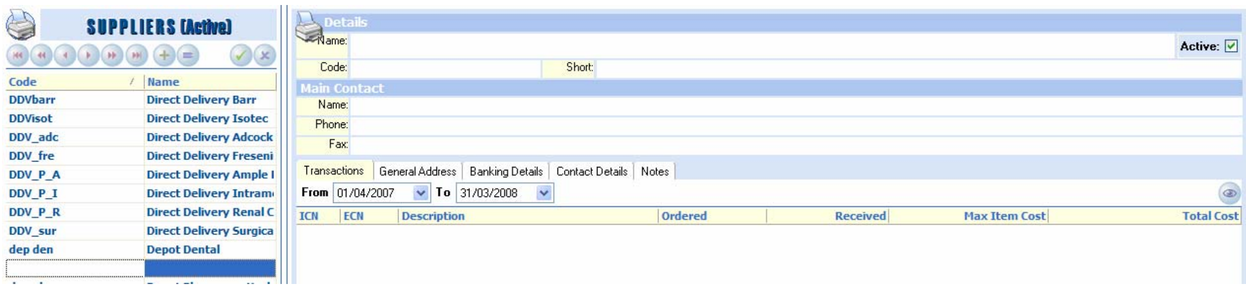
For a description of these buttons and their functions, see chapter 3, "Understanding the Features and Navigation." The screen can be customized using the filters, groupings, and sorting described in chapter 3.

Using RxSolution to Manage Supplier Data

How Do I Add a Supplier?

1. Click on the add a new record icon . If the ican is not visible, it means that the logged in user does not have access as set up in User admin. 

2. A blank supplier form appears—



3. By default, the supplier will be marked as **Active** 

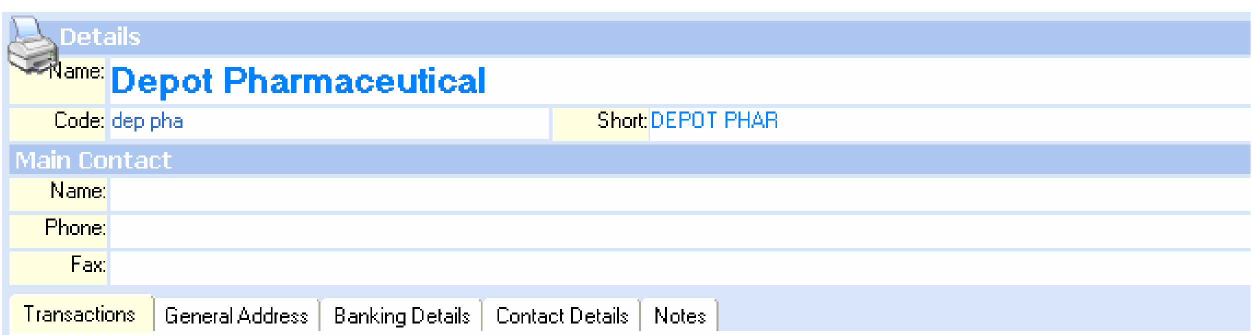
. A checked box activates the supplier, allowing it to be seen on the supplier list and on reports. If the box is not checked, the new supplier will not be created.

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.

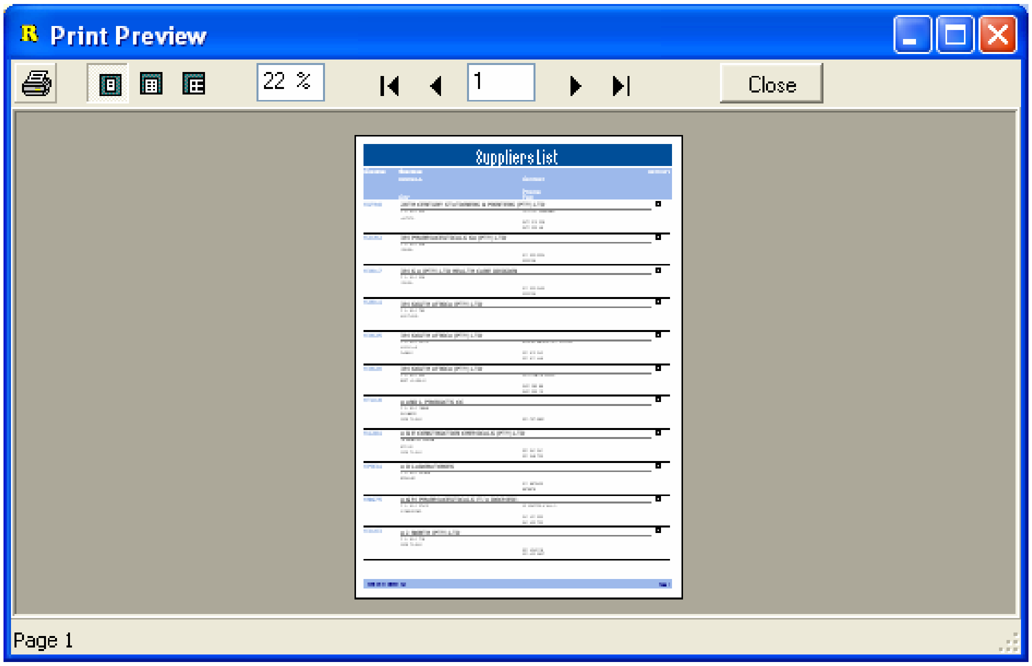
6. Click on the save button to the right of the navigation buttons.

7. You may enter additional information about the supplier in the **General Address**, **Banking Details**, **Contact Details**, and **Notes** tabs.



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**

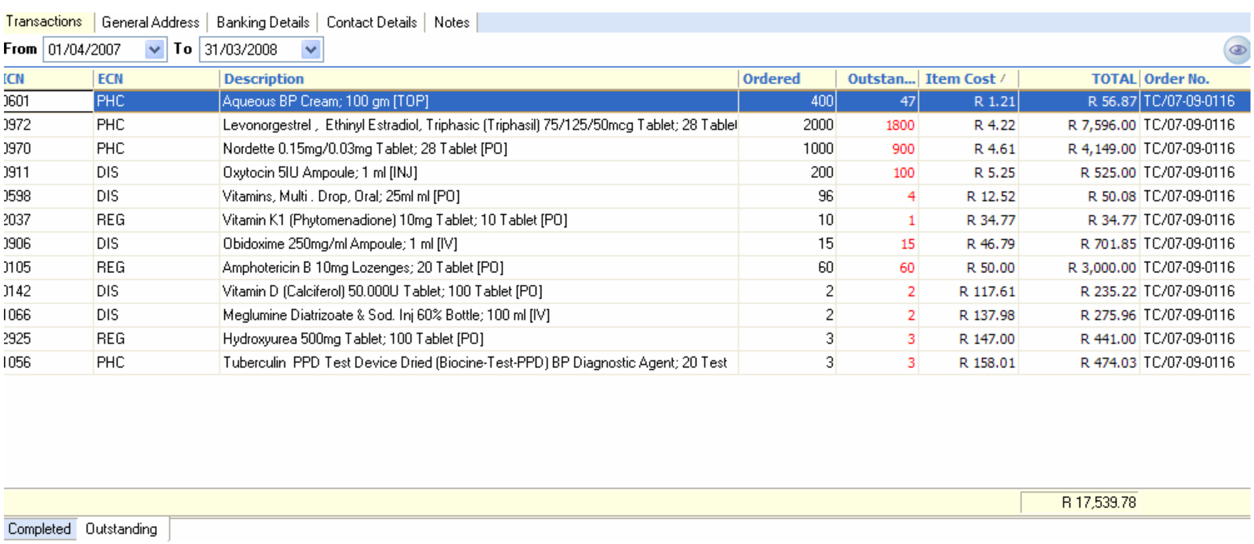
Transactions Tab

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

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; 50	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 [OPTH]	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 Completed Outstanding

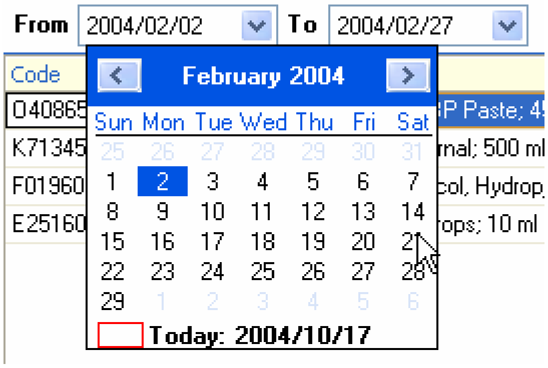
The lists include the products that were ordered by their code and description, the date ordered, the date received, the maximum item cost, and the total cost. The total value of receipts for the financial year determined by the date filter is displayed at the bottom right-hand corner of the list.



ICN	ECN	Description	Ordered	Outstan...	Item Cost	TOTAL	Order No.
0601	PHC	Aqueous BP Cream; 100 gm [TOP]	400	47	R 1.21	R 56.87	TC/07-09-0116
0972	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
0970	PHC	Nordette 0.15mg/0.03mg Tablet; 28 Tablet [PO]	1000	900	R 4.61	R 4,149.00	TC/07-09-0116
0911	DIS	Oxytocin 5IU Ampoule; 1 ml [INJ]	200	100	R 5.25	R 525.00	TC/07-09-0116
0598	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
0906	DIS	Obidoxime 250mg/ml Ampoule; 1 ml [IV]	15	15	R 46.79	R 701.85	TC/07-09-0116
0105	REG	Amphotericin B 10mg Lozenges; 20 Tablet [PO]	60	60	R 50.00	R 3,000.00	TC/07-09-0116
0142	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
2925	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	

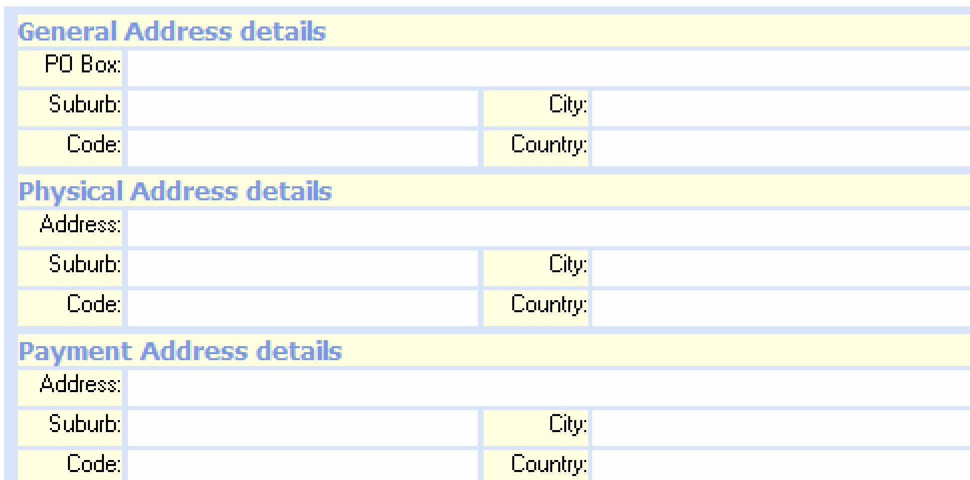
By default, the period of transactions listed corresponds to issues posted for the financial year to date (FYTD). The period can be changed by selecting a different range of dates.

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



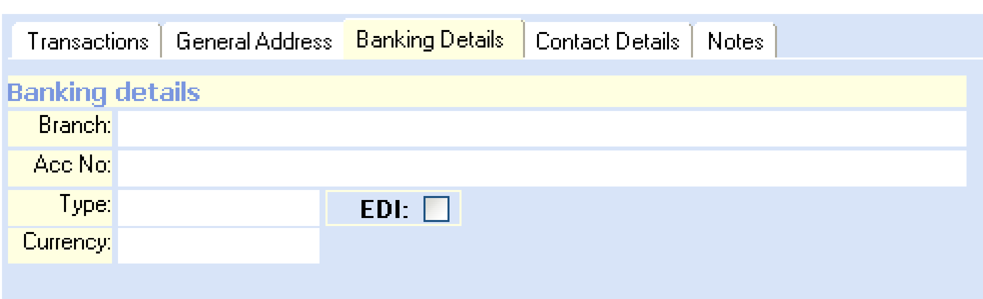
General Address Tab

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



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.

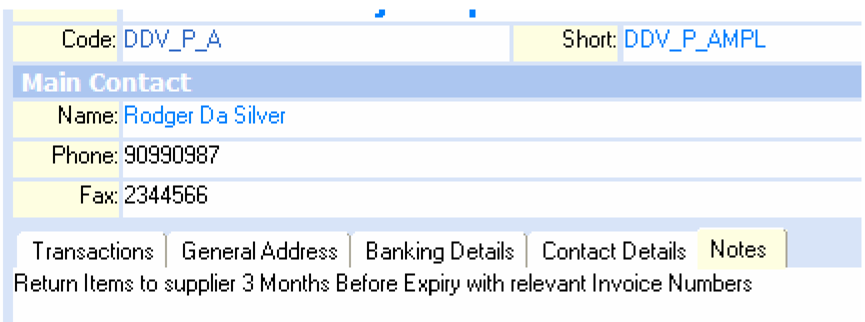


Contact Details

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

Notes

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



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.

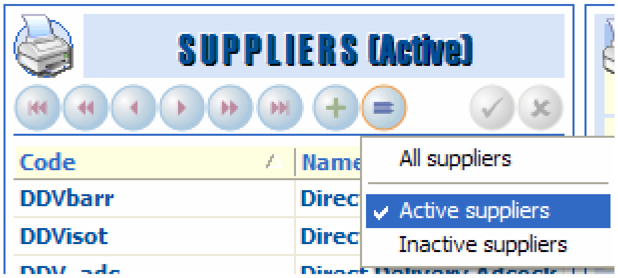
4. Follow the usual procedure to print a document.

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.

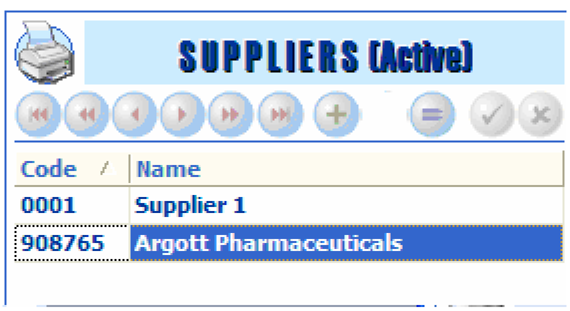
1. Click on the word **Code** or **Name**.

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.

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

How Do I Search for a Supplier?

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



2. 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.

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 Active: ☑. This will remove the check mark Active: ☐.
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 Active: ☑.
4. Click on save.
5. Change the filter selection back to **Active suppliers**.