



# Introduction

Welcome to Open mSupply!

## History

Open mSupply builds on over 20 years of mSupply, over which time it has become the most used Logistics Management Information System (LMIS) in low & middle income countries.

## What does it do?

In short, Open mSupply manages your inventory, recording every receipt and issue of goods, and thereby providing a running balance of your stock on hand of each item.

Open mSupply does much more than that. Features include:

- Inventory management
  - Easily see per-batch stock on hand
  - Manage shelf locations for your store/warehouse
  - Assign locations to incoming stock, or change locations as you rearrange stock in your warehouse
  - Perform stocktakes, and assign reasons for inventory adjustments
- Receive and fulfil orders from customers (facilities you supply)
- Place orders with your supplying store
  - Quantify amounts required based on simple or complex formulae
  - Track order status as your supplying store fulfils and ships the order!
  - Receive goods into stock when the order arrives
- Be alerted to low stock levels from the dashboard

## What makes mSupply special?

There are a lot of systems that manage inventory. mSupply has unique features that make it ideal for use for health supply chains in low resource settings:

- **Offline first** mSupply is designed from the ground up to work without internet. We know from 20 years of experience that even the most reliable internet connections sometimes fail or get overloaded. mSupply allows you to work without having to worry

about second-by-second internet quality. Of course, when you need to place orders or receive updates from other facilities, you need internet for a few minutes then.

- **Scalable** We've designed Open mSupply to handle billions of transactions a year, but to also work on an Android tablet! You can implement mSupply in one facility, knowing that if you later decide to deploy thousands of sites, mSupply will still be the right tool.

To get some insight into the full breadth of mSupply's functionality, have a look at the legacy mSupply software documentations at <https://www.msupply.org.nz> - it's almost 1000 pages if you print it all (so maybe don't ☺)

## Terminology

The following table outlines some of the common terms used in mSupply, and also guides users of legacy mSupply regarding terminology improvements we have made.

Open mSupply Term	Legacy mSupply term	Definition
Outbound Shipment	Customer Invoice	The creation of a supply of goods to a particular customer (facility)
Inbound Shipment	Supplier Invoice	The receiving of a supply of goods from a particular supplier
Requisition	Customer Requisitions	An order for supply of goods made by a particular customer (facility)
Internal Orders	Supplier Requisitions	A request for stock made for a particular supplier (facility)

## Getting Started

If you are running the server for the very first time, you may see this screen:

# Welcome!

To get started, we'll need to configure the settings to synchronise with mSupply. Please enter the values and click Save.

If you're not sure what to enter, contact support@msupply.foundation.



Central server URL

Site ID

Site name

Sync password

 Save

Don't panic! This simply means that the server needs to know how to connect to the central mSupply server. If you don't know what to enter, contact support and they can help.

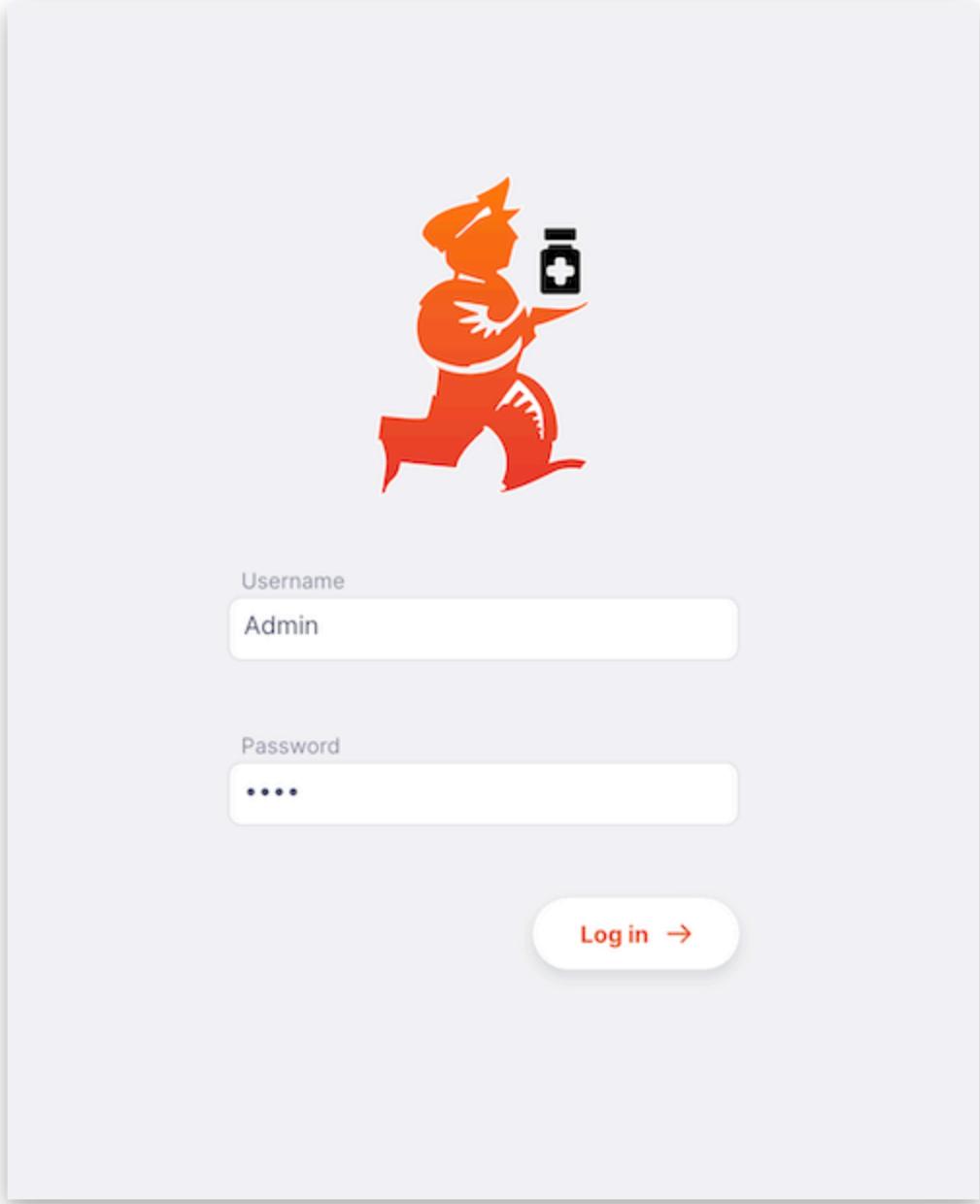
# Tutorial

## Open mSupply Tutorial

This tutorial is designed to guide you through the basics of using Open mSupply

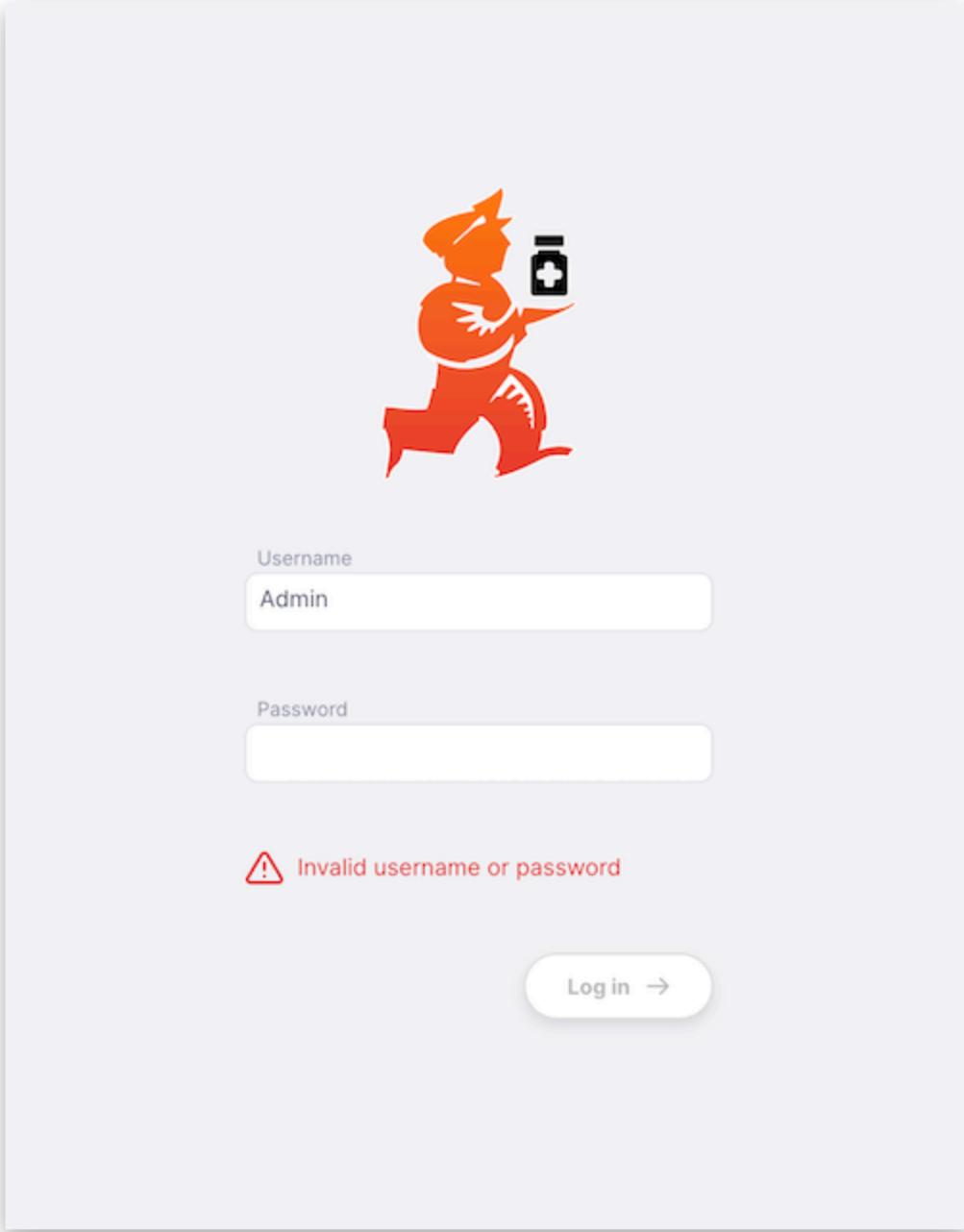
### Logging in

1. For a start, you'll need to open your web browser. We like Firefox, but Chrome and its myriad children will also suffice.
2. Enter the web address (URL) of your mSupply server. In our case we're using <https://demo-open.msupply.org> - our test web site.
3. After pressing on your keyboard you'll be shown the login page



4. Enter your user name and password and press on your keyboard, or click the [Log in] button

All going well, you'll be redirected to the dashboard page. If there was a problem, you'll see an error message, like this:



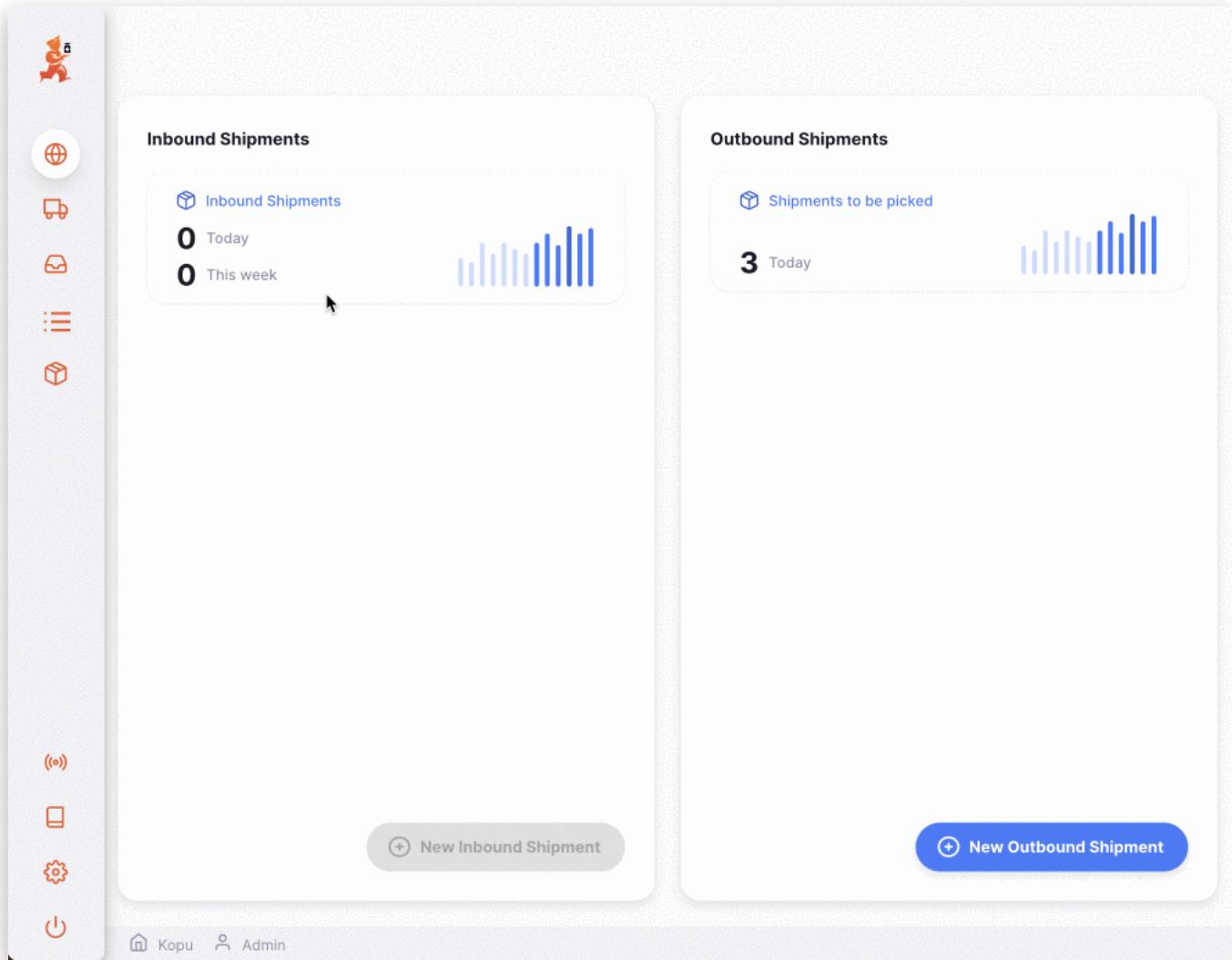
Try re-typing the username and password (note that both are case-sensitive). When you log in, the default store for your user is selected as the current store. If you have access to other stores, you'll be able to change stores after logging in (see below). If you have logged in previously, and changed stores, then the most recent store will be selected for you when you log in.

## Navigating around

The main menu is on the left side of the screen. If you have a small screen size, then it will be

collapsed by default - for larger screens it will instead be open by default. To open and close you can click on the logo at the top, as shown below. The menu remains either open or closed once you have selected an option.

If the menu is closed, simply hovering over the menu items will open it, in which case clicking on an item will let the menu close again. If you are on a tablet, clicking on a menu item will have the same effect.

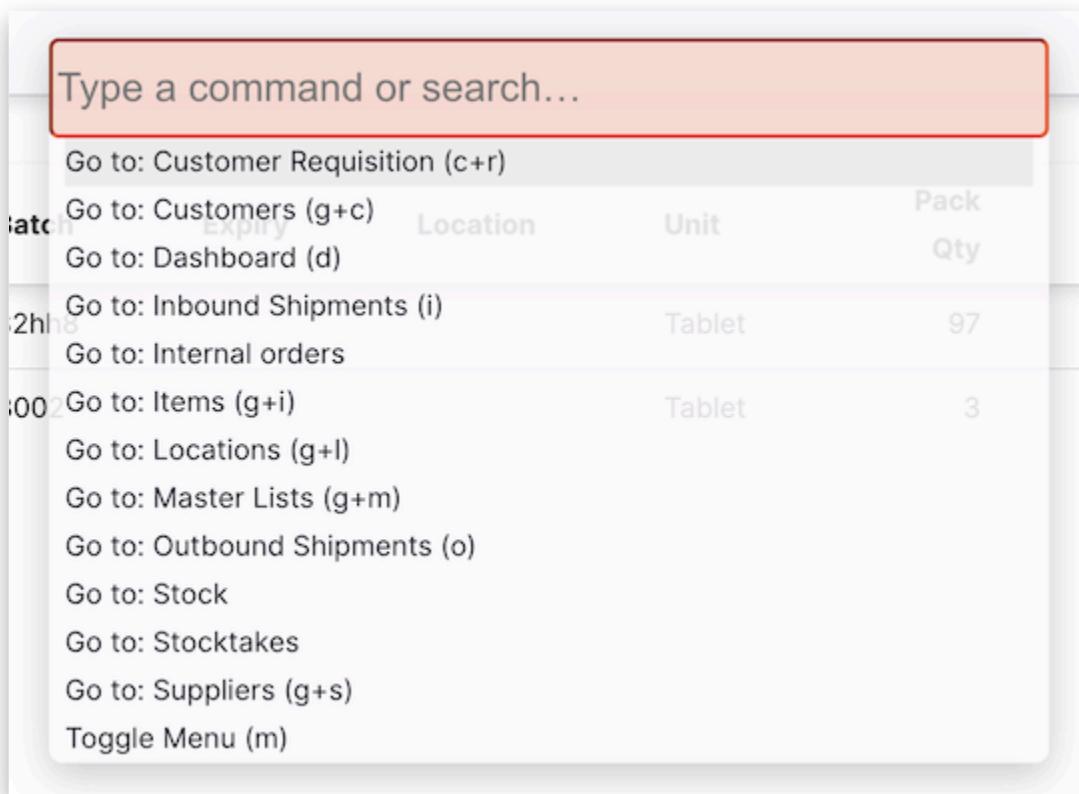


On some screens you'll see that the header shows a heading, such as **Outbound Shipment** in the example above. Clicking on a specific shipment then changes that heading to **Outbound Shipment/ #[the shipment number]**. You are able to click on the **Outbound Shipment** part to return to the list - or use the main navigation on the left.

## Keyboard shortcuts

There are keyboard shortcuts used throughout open mSupply. Rather than remember them all, to get started you simply have to remember the combination **control (ctrl)+k** (windows and linux) or **cmd (⌘)+k** (mac)

This will bring up the following window, no matter which page you are on:



This shows you the list of globally available shortcuts, for example pressing **d** on your keyboard will take you to the dashboard (unless you are entering text into an input field!).

However, you can also click on an item in the list, or search available commands:

The screenshot shows the Outbound Shipment screen with a list of 20 entries. The columns are: Name, Status, Number, Created, Reference, Comment, and Total. The entries include various locations like Hufflepuff Health Centre, Kamo Regional Warehouse, and Kawakawa Health Centre, with statuses ranging from Shipped to New. The total value for all entries is \$0.00.

Name	Status	Number	Created	Reference	Comment	Total
Hufflepuff Health Centre	Shipped	5	09/03/2022			\$0.00
Kamo Regional Warehouse	Allocated	0	08/04/2022			\$0.00
Kamo Regional Warehouse	Shipped	0	07/04/2022			\$0.00
Kamo Regional Warehouse	New	0	04/04/2022			\$0.00
Kamo Regional Warehouse	Shipped	0	14/04/2022			\$0.00
Kamo Regional Warehouse	New	0	08/04/2022			\$0.00
Kawakawa Health Centre	Verified	8	24/02/2022			\$100.00
Kopu Health Centre	Shipped	4	08/03/2022			\$0.00
Tamaki Central Medical Store	Verified	26	12/08/2021	generated data		\$0.00
Tamaki Central Medical Store	Verified	33	12/03/2022	generated data		\$0.00
Tamaki Central Medical Store	Verified	14	06/08/2021	generated data		\$0.00
Tamaki Central Medical Store	Verified	18	06/12/2021	generated data		\$0.00
Tamaki Central Medical Store	Verified	31	12/01/2022	generated data		\$0.00
Tamaki Central Medical Store	Verified	9	02/03/2022	generated data		\$0.00

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Opua Admin

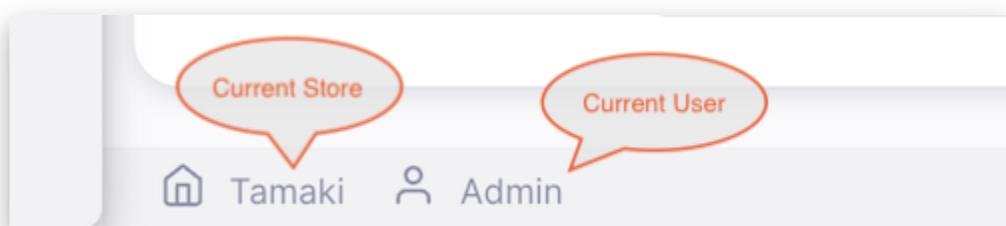
In addition - there are various places where specific keyboard shortcuts are available. An example is the tab control used in both Stocktakes and Inbound Shipments. Here you can use `control+1` to navigate to the first tab (Quantities) or `control+2` for the second tab (Pricing) etc. If you press + on your keyboard, you can add a new batch.

The screenshot shows the Quantities tab with a table. The columns are: Batch, Expiry, # Packs, Pack Size, and Unit Qty. There is one entry for Batch B115 with an expiry date of 05/2023, 13 packs, a pack size of 1, and a unit quantity of 13.

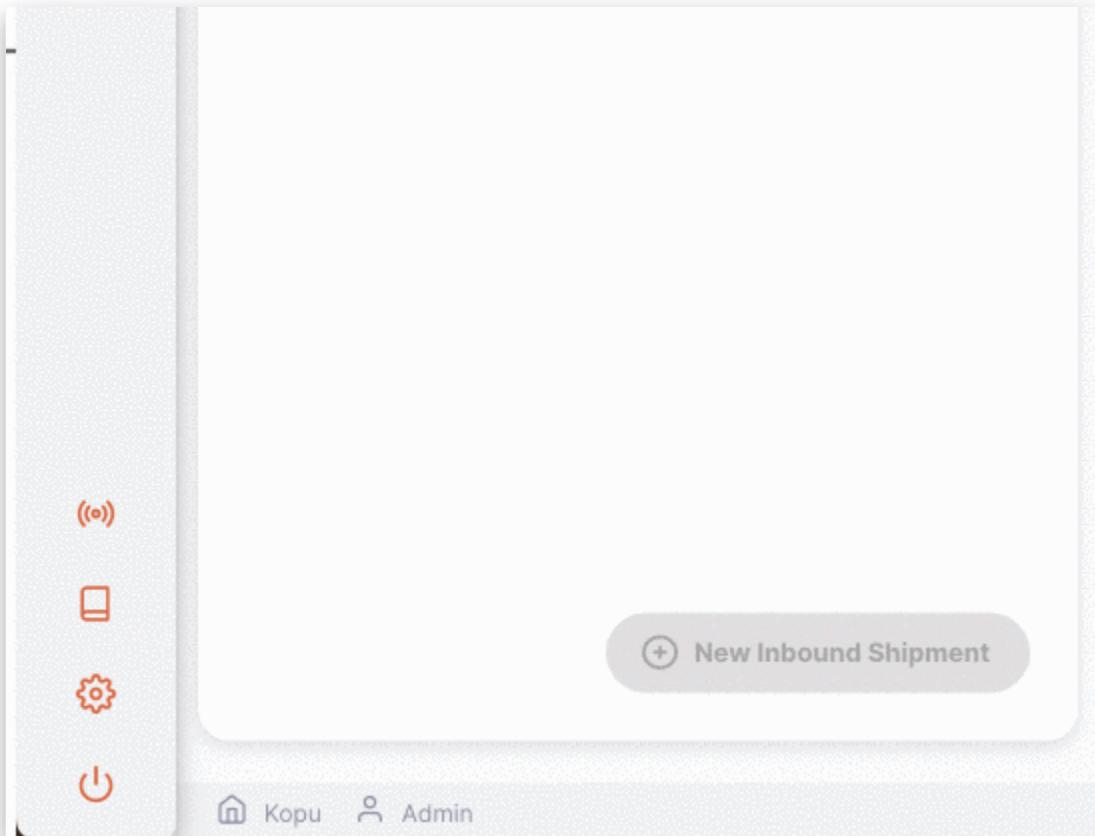
Batch	Expiry	# Packs	Pack Size	Unit Qty
B115	05/2023	13	1	13

## Footer

The bottom of the screen contains some useful information and is shown on every screen



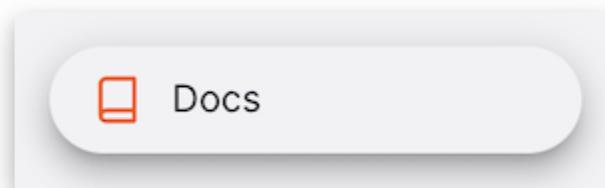
Some users have access to more than one store. To change the store which is currently selected, simply click on the store name in the footer:



You will see the notification and the store name in the footer will be updated. From now, all actions will be in the newly selected store.

## Help!

If you get stuck at any time when using the site, click on the **Docs** menu item.



This will take you to the documentation page which relates to the current page you are viewing.

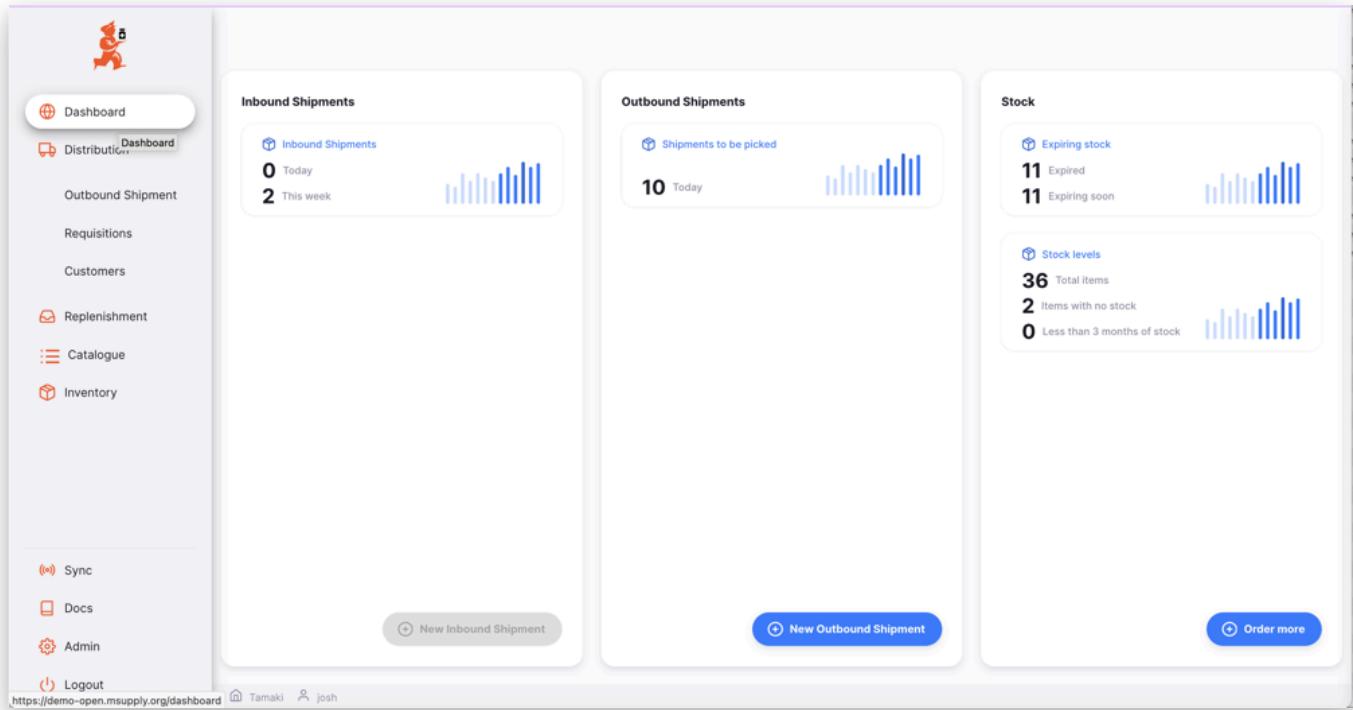
# Dashboard

The landing page

## Too many Dashboards!

Yes, we use the term *Dashboard* for more than one thing. Open mSupply has a landing page which gives an overview of some statistics, and has some useful links, which we're talking about here, and also a system dashboard that uses Grafana, and gives an overview of all sites in your country (or organisation).

## What's on display?



You can see some statistics for shipments and stock:

- Inbound Shipments
  - **Today** Shows the number of inbound shipments created today
  - **This week** The number created during the current week
- Outbound Shipments
  - **Today** The number of shipments to be picked today, that is, the number with

the status of Allocated

- Stock
  - **Expired** The number of stock lines in the current store which have expired
  - **Expiring soon** The number of stock lines in the current store which will expire within the next three months
  - **Total items** A count of the number of items in this store
  - **Items with no stock** The item is visible in this store, but there is no stock recorded
  - **Less than 3 months of stock** Which is based on the average monthly consumption (AMC) for this item in the current store

As well, there are buttons toward the bottom of the page which allow you to create shipments and requisitions.

# Outbound Shipments

Outbound Shipments can be used to issue stock to a customer.

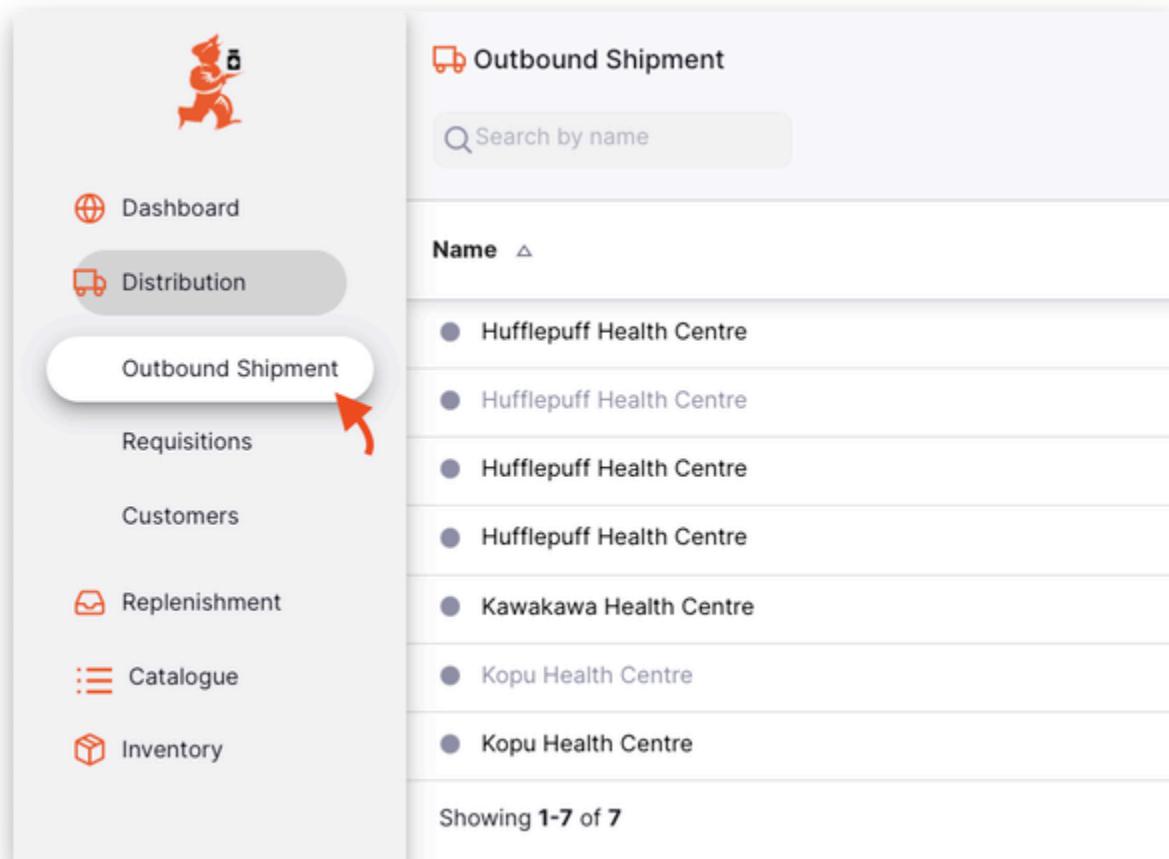
If you have used mSupply in the past, you may be familiar with the term **Customer Invoice** instead of Outbound Shipment. An Outbound Shipment can be used to:

- Transfer stock to another store which also uses mSupply
- Issue stock to a customer
- Fulfill requisitions (customer orders)

## Viewing Outbound Shipments

### Open the Outbound Shipments Menu

Choose Distribution > Outbound Shipment in the navigation panel.



You will be presented with a list Outbound Shipments (if you don't see any, you are probably

just starting!).

From this screen you can:

- View a list of Outbound Shipments
- Create a new Outbound Shipment
- Export Outbound Shipments to a .csv file
- Print one or multiple Outbound Shipments

## Outbound Shipment list

1. The list of Outbound Shipments is divided into 7 columns:

### Column Description

**Name** Name of the Customer

**Status** Current Status of the shipment

**Number** Reference Number of the shipment

**Created** Creation date of the shipment

**Reference** Customer reference

**Comment** Comment for the shipment

**Total** Total value of the shipment

1. The list can display a fixed number of shipments per page. On the bottom left corner, you can see how many shipments are currently displayed on your screen.

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3. If you have more than 20 shipments, you can navigate to the other pages by tapping on the page number or using the right of left arrows (bottom right corner).

< 1 2 3 >

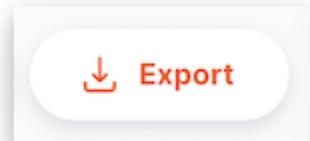
## Search by Customer Name

You can filter the list of shipments by customer name. This can be useful if you're looking for one particular shipment!

Type the name of a customer in the `Search by name` field (on the left, just above the list headers). All the shipments for this customer appear in the list.

## Exporting Outbound Shipments

The list of Outbound Shipments can be exported to a comma separated file (csv). Simply click the export button (on the right, at the top of the page)



and the file will be downloaded. The export function will download all Outbound Shipments, not just the current page, if you have more than 20 of them. Shipments are exported using sort order selected in the table, though of course you could easily sort the list in Excel or whatever you open the .csv file with!

## Delete an Outbound Shipment

You can delete a shipment from the Outbound Shipment list.

1. Select the shipment that you want to delete by checking the box on the left end of the list. You can select more than one shipment to be deleted. You can even select them all using the master checkbox in the list headers.
2. Open the `Select` dropdown (top right corner, above the list) and select `Delete selected lines`.
3. A notification confirms how many shipments were deleted (bottom left corner).

You can only delete Outbound Shipments with a status `NEW`.

Name	Status	Invnum	Entered	Comment	Total
Hufflepuff Health Centre	Shipped	5	09/03/2022		<input type="checkbox"/>
Kamo Regional Warehouse	New	31	30/03/2022		<input type="checkbox"/>
Kamo Regional Warehouse	New	29	30/03/2022		<input type="checkbox"/>
Kamo Regional Warehouse	New	19	30/03/2022		<input type="checkbox"/>
Kamo Regional Warehouse	New	12	30/03/2022		<input type="checkbox"/>
Kamo Regional Warehouse	New	8	29/03/2022		<input type="checkbox"/>
Kamo Regional Warehouse	New	32	30/03/2022		<input type="checkbox"/>
Kamo Regional Warehouse	New	33	30/03/2022		<input type="checkbox"/>
Kamo Regional Warehouse	New	13	30/03/2022		<input type="checkbox"/>
Kamo Regional Warehouse	New	36	30/03/2022		<input type="checkbox"/>
Kamo Regional Warehouse	New	9	29/03/2022		<input type="checkbox"/>

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## Creating an Outbound Shipment

1. Go to Distribution > Outbound Shipment.
2. Press the New Shipment button, in the top right corner

Name	Status	Invnum	Entered	Comment	Total
Hufflepuff Health Centre	New	6	3/13/20...		
Hufflepuff Health Centre	Ship...	5	3/9/2022		
Hufflepuff Health Centre	New	8	3/15/20...		
Hufflepuff Health Centre	New	9	3/16/20...		
Kawakawa Health Centre	New	2	2/24/20...		
Kopu Health Centre	Ship...	4	3/8/2022		
Kopu Health Centre	New	7	3/14/20...		

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3. A new window `Customers` opens, inviting you to select a customer.

### Select a Customer

1. In the `Customers` window, you will be presented with a list of available customers. You can select your customer from the list or you can type as much of a customer name.

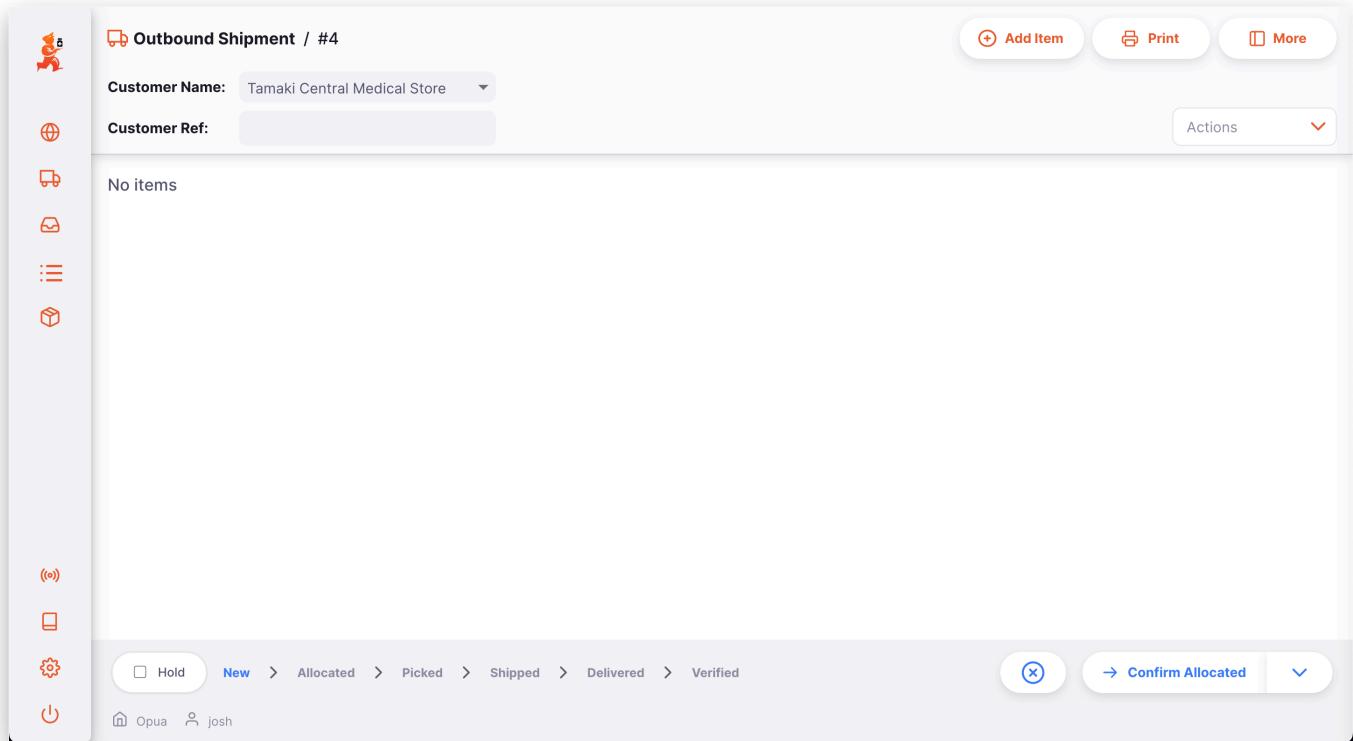
In below example, we are issuing stock to **Kamo Regional Warehouse**.

Customers		
use	<b>Baltimor</b>	Baltimor
e	<b>HO100</b>	Bayer Pharma AG
Store	 <b>HUF</b>	Hufflepuff Health Centre
	 <b>KamoRW</b>	Kamo Regional Warehouse
	 <b>Opua</b>	Opua Health Centre
	 <b>Tamaki</b>	Tamaki Central Medical Store
	 <b>Waikato</b>	Waikato District Store (On Hold)

You can tell if a customer is also using mSupply in their store. If they do, you will see icon like this (  ) next to the supplier code.

2. Once you tap or press Enter, your Outbound Shipment is automatically created

If everything went well, you should see the name of your customer in the top left corner and the status should be NEW



## Edit the Customer Name

If you have selected the wrong customer, you can change the customer name in the Customer Name field or select one the dropdown list:

The screenshot shows the Open mSupply mobile application's user interface. The left side features a sidebar with various icons and labels: Dashboard (globe), Distribution (truck), Outbound Shipment (highlighted in orange), Requisitions, Customers, Replenishment (receipt), Catalogue (list), and Inventory (cube). The right side is the main panel, titled "Outbound Shipment / #7". It contains a "Customer Name" dropdown set to "Kopu Health Centre" with a dropdown arrow, a "Customer Ref:" input field, and a message "No items".

## Enter a Customer Reference

Once your Outbound Shipment has been created, you can enter a customer reference in the Customer Ref field, if they have one (eg. PO#1234567)

## View or edit the Outbound Shipment Information Panel

The Information Panel allows you see or to edit information about the Outbound Shipment. It is divided in multiple sections:

- Additional Info
- Related Documents
- Invoice Details
- Transport Details

We are planning to add more sections in the future as Open mSupply grows.

## How to open and close the Information Panel ?

If you are using a large screen, the information panel will be automatically opened for you.

However, on an average sized screen, the information panel will be closed by default.

To open the Information Panel, you can tap on the **More** button, located in the top right corner of the Outbound Shipment view.

You can close by tapping on the **X Close** button, on the top right corner of the information panel.

The screenshot shows the Outbound Shipment view with the information panel open. The panel title is "Outbound Shipment / #7". The customer name is set to "Tamaki Central Medical Store". There are buttons for "Add Item", "Print", and "More". A "Customer Ref:" field and an "Actions" dropdown are also visible. On the left, there's a vertical sidebar with various icons. The main content area displays a table of items:

Code	Name	Batch	Expiry	Location	Unit	Pack Quantity	Pack Size
030453	Amoxicillin 250mg tabs	ABC123			Tab	50	1

At the bottom, there are buttons for "Hold", "New", "Allocated", "Picked", "Shipped", "Delivered", "Verified", "Confirm Allocated", and a dropdown menu.

## Additional Info

In the **Additional Info** section, you can:

- See who created the Outbound Shipment (name of the user)
- View and edit the Outbound Shipment color. To edit the color, tap on the colored circle and select a color from the pop-up
- Write or edit a comment

## Related Documents

In the **Related Documents** section, you can see other related transaction document for the Outbound Shipment.

If your Outbound Shipment was created to fulfill a **Requisition**, the reference number of the requisition would appear in this section.

In the future, we would also include other documents such as temperature records, transportation documents or pickslips.

## Invoice Details

In this section, you will see by default the total selling price of the items listed in the Outbound Shipment.

You can also add a **Service charges** if you wish to add other charges such as Freight Costs. To add a Service charges to the Invoice Details:

1. Tap on the **Edit Service Charges** button. A new window opens.
2. Tap on the **Add charge** button on the new window. A new line appears in the list of charges. You tap on **Cancel** if you do not wish to add anything.
3. **Name:** Select a service charges in the dropdown list. You can customise the list of available charges. Contact your administrator
4. **Comment:** You can add a comment to provide further details about the new charge
5. **Amount:** Enter the amount of the charge
6. **Tax:** Enter a % of tax for the charge
7. **Total:** The total field is automatically calculated based on the Amount and the Tax percentage
8. **Delete:** You can tap on the **Delete** icon to delete the charge

In this section, you can also edit the tax rate (%) for the items sell price. Tap on the pencil icon and enter a value.

## Transport Details

In this section, you can see or edit a transport reference number (eg. a booking or a tracking reference number).

## Outbound Shipment Status Sequence

The status sequence is located at the bottom left corner of the Outbound Shipment screen.

Passed statuses are highlighted in blue, next statuses appear in grey.

New > Allocated > Picked > Shipped > Delivered > Verified

Status Sequence: current status is NEW.

New > Allocated > Picked > Shipped > Delivered > Verified

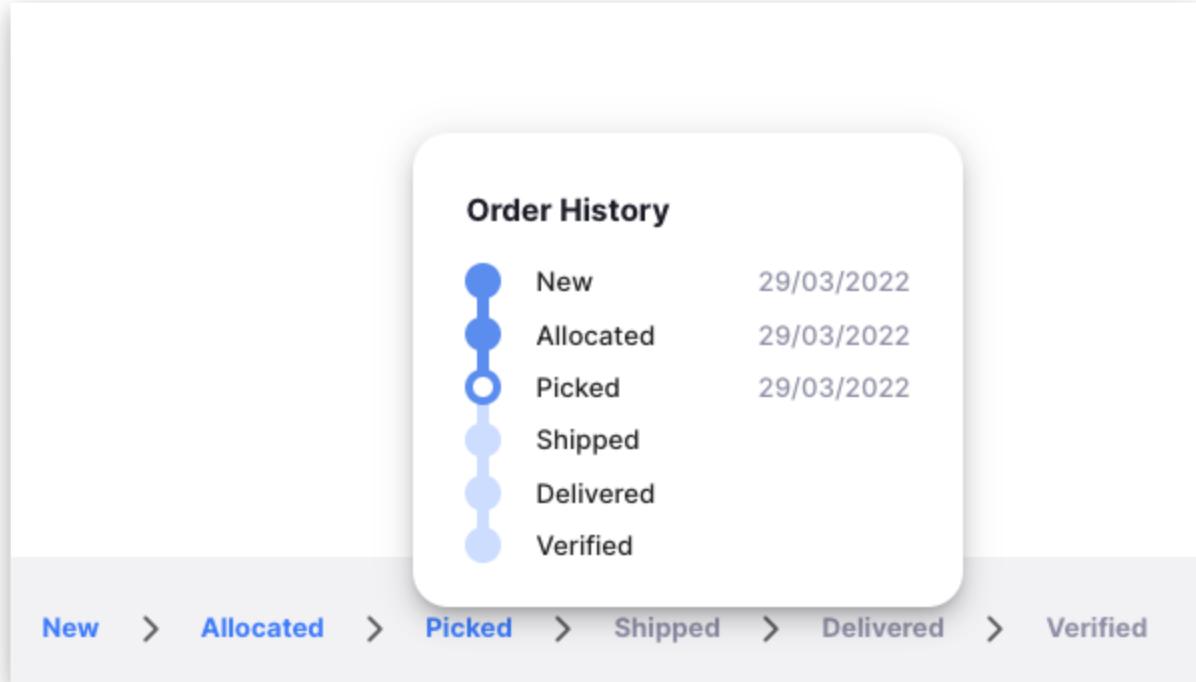
Status Sequence: current status is PICKED.

There are 6 status for the Outbound Shipment:

Status	Description
<b>New</b>	This is the first status when you create a shipment
<b>Allocated</b>	Allocation is confirmed. Goods are no longer available for other shipments but are still part of your inventory.
<b>Picked</b>	Shipment is picked and is now ready to ship. Goods are still part of your inventory.
<b>Shipped</b>	Shipment has been shipped and goods are no longer part of your inventory
<b>Delivered</b>	Your customer has received the shipment
<b>Verified</b>	Your customer has verified the quantity of the shipment. Goods are now part of their inventory .

If you hover over the status sequence, a shipment history window appears. You can see the date when a shipment was updated from one status to another.

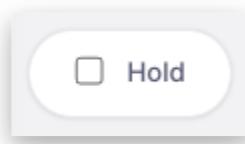
This shipment has been created, allocated and picked on 29/03/2022



## Hold checkbox

Located on the bottom left corner, on the left of the status sequence.

Check the `Hold` checkbox prevents the Outbound Shipment from being updated to the next status.



## Cancel and Confirm button

### Cancel Button

Tap on the `Cancel` button to quit the Outbound Shipment view and return to the Outbound Shipments list.

### Confirm Button

The `Confirm` button is the button to update the status of a shipment. The status which you can confirm depends on the current status of the shipment and follows the sequence shown

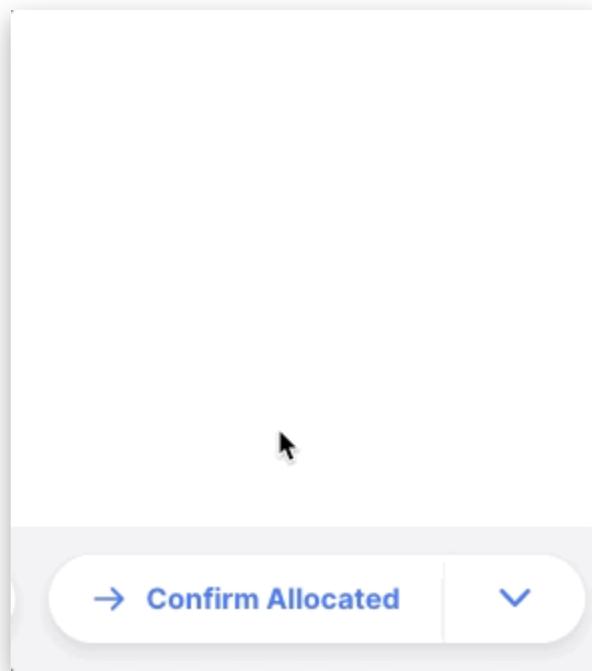
below.

When managing an Outbound Shipment, you can only confirm the Allocation, the Picking and the Shipment.

Confirm...	Current Status	Next Status
<b>Confirm Allocated</b>	New	Allocated
<b>Confirm Picked</b>	Allocated	Picked
<b>Confirm Shipped</b>	Picked	Shipped

You don't have to update a shipment to next status in the sequence. You can choose to skip some of them to go directly to **Confirm Shipped** for example.

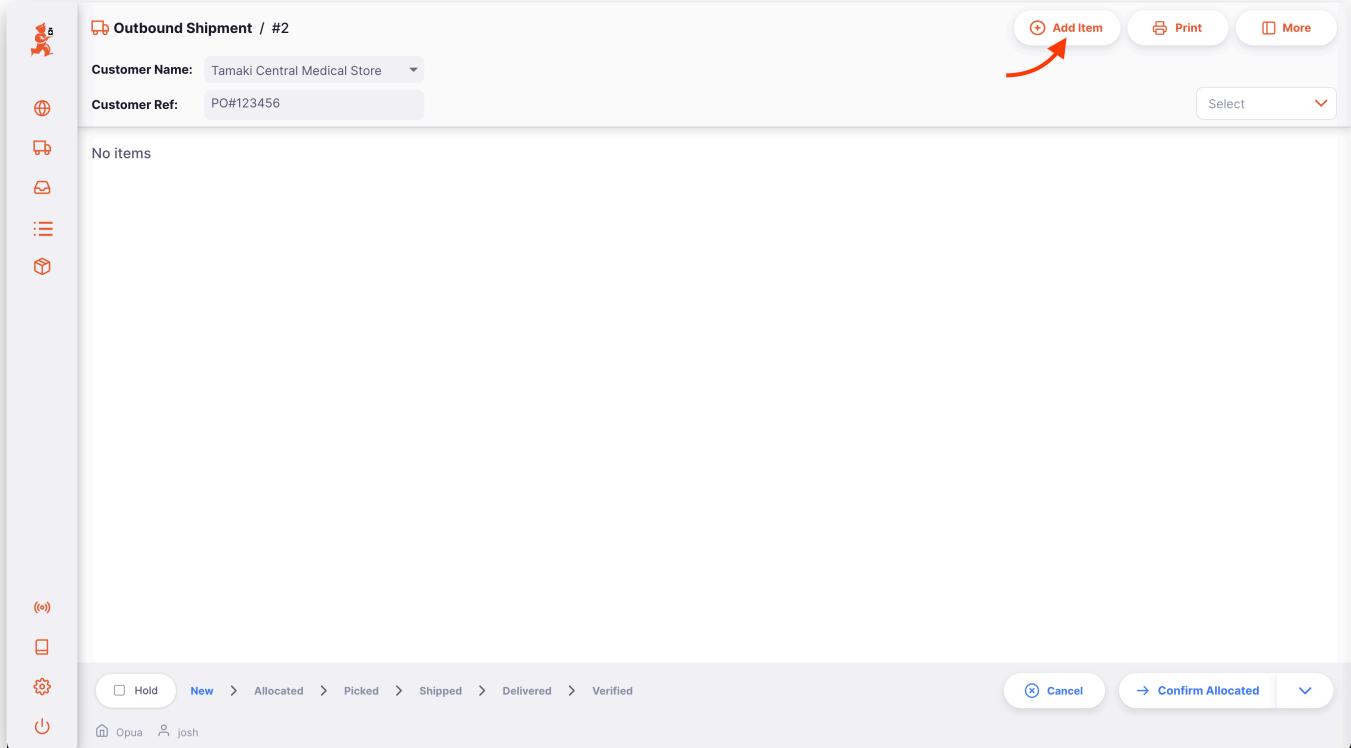
As demonstrated below, tap on the down arrow of the **Confirm** button and select the status you want the shipment to be updated to.



## Adding lines to an Outbound Shipment

Tap on the **Add Item** button (top right corner).

A new **Add Item** window opens.

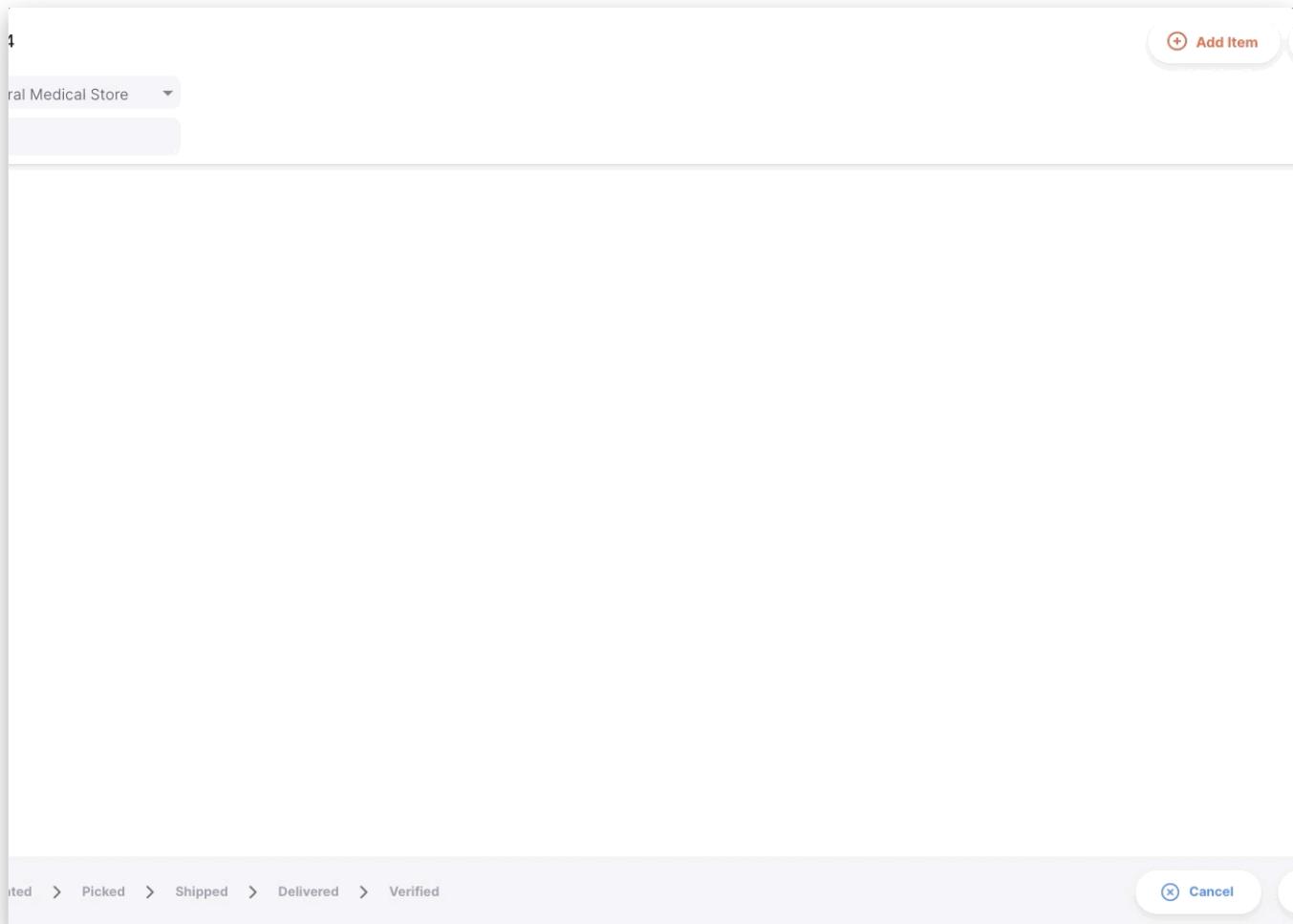


## Select an Item

In the Add Item window, you can look up an item by:

- Reading through the list of available items
- or by typing some or all of item name
- or by typing some or all of an item code

Once your item is highlighted, tap on the name or press Enter.

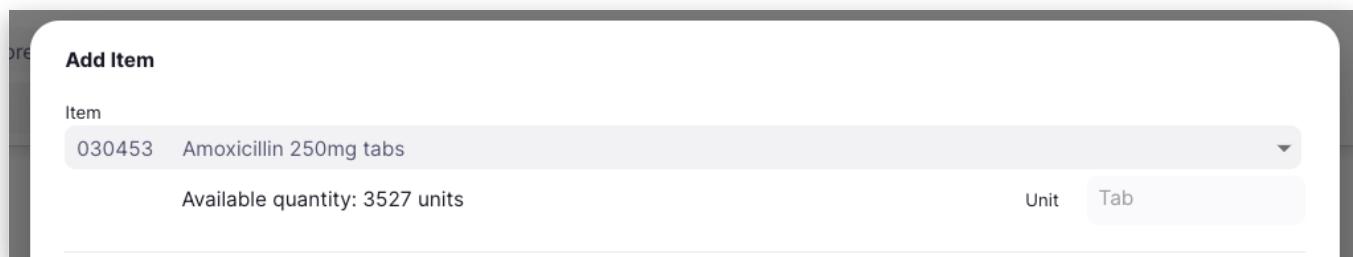


Once the item is selected, you can see the following information:

## Headers

- Item code and name (eg. *030453 Amoxicillin 250 mg Tabs*)
- the available stock quantity for this item (eg. *3527 units*)
- the item's unit (eg. *Tab*)

**Example:** For the item \*030453 - Amoxicillin 250mg tabs\*, there are 3527 tabs available.

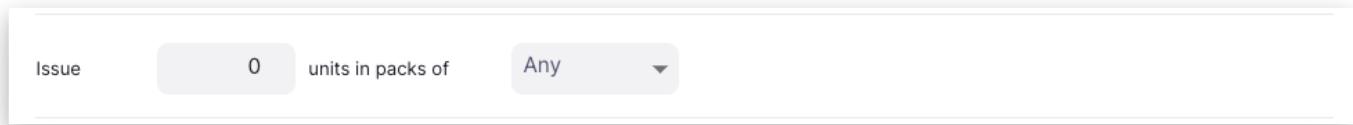


## **Issue [Quantity] of units in packs of [Pack Size]**

In the Issue Quantity field, you can enter the quantity that you want to issue to your customer.

By default, you are invited to issue a quantity of **units**. However, you have the possibility to issue a quantity of packs instead by changing the value in the second dropdown (**Pack Size**).

Default value is Any when you are issuing units.



## **List of available batches:**

This is a list of batch numbers that you have in store for this item:

- **# Packs:** Number of packs to be issued
- **Pack Size:** Quantity of units per pack
- **Unit Qty:** Total quantity of units to be issued
- **Available:** Number of packs available (not already allocated to other shipments)
- **In store:** Total number of packs in your store
- **Batch:** Batch number. It is a designation given to products made in the same manufacturing run.
- **Expiry:** Expiry date of the batch (format: MM/YYYY)
- **Location:** If you inventory is managed with storage locations, the name of the location where the item is stored
- **Sell:** Selling unit price of the item
- **On Hold:** Indicate whether a batch is on hold or not. You cannot issue a batch that is on hold.
- **Placeholder:** The placeholder line is used when the quantity you are issuing is higher than your available stock

# Packs	Pack Size	Unit Qty	Available	In store	Batch	Expiry	Location	Sell	On Hold
0	1	0	999	1000		05/2024	A1	\$0.00	
0	12	0	40	50		05/2024	A1	\$0.00	
0	1	0	998	1000		05/2024	A1	\$0.00	
0	1	0	25	25		05/2025		\$3.00	
0	1	0	25	25		05/2025		\$3.00	
0	5	0	0	5		05/2025		\$0.00	
0	5	0	0	5		05/2025		\$0.00	
Placeholder	0								

## Issue a quantity of units

By default, you are invited to issue a quantity of **units**, regardless of the pack size (number of units in a pack).

When entering a number in the **Issue Quantity** field, system automatically chooses the batch number(s) with the shortest expiry date (First to Expire, First Out or FEFO logic).

In below example, we are issuing 100 units of the item. All 100 units will be taken from the same batch (second row). First batch was not selected because it is expired.

Issue
100
units in packs of
Any
▼

---

# Packs	Pack Size	Unit Qty	Available	In store	Batch	Expiry	Location	Sell	On Hold
0	1	0	1000	1000		05/2020		\$0.00	
100	1	100	999	1000		05/2024	A1	\$0.00	
0	12	0	40	50		05/2024	A1	\$0.00	
0	1	0	998	1000		05/2024	A1	\$0.00	
0	1	0	25	25		05/2025		\$3.00	
0	1	0	25	25		05/2025		\$3.00	
0	5	0	0	5		05/2025		\$0.00	
0	5	0	0	5		05/2025		\$0.00	

( Cancel)
( OK)
( OK & Next)

In this other example, we are issuing 1200 units. System selects two batches with different pack sizes.

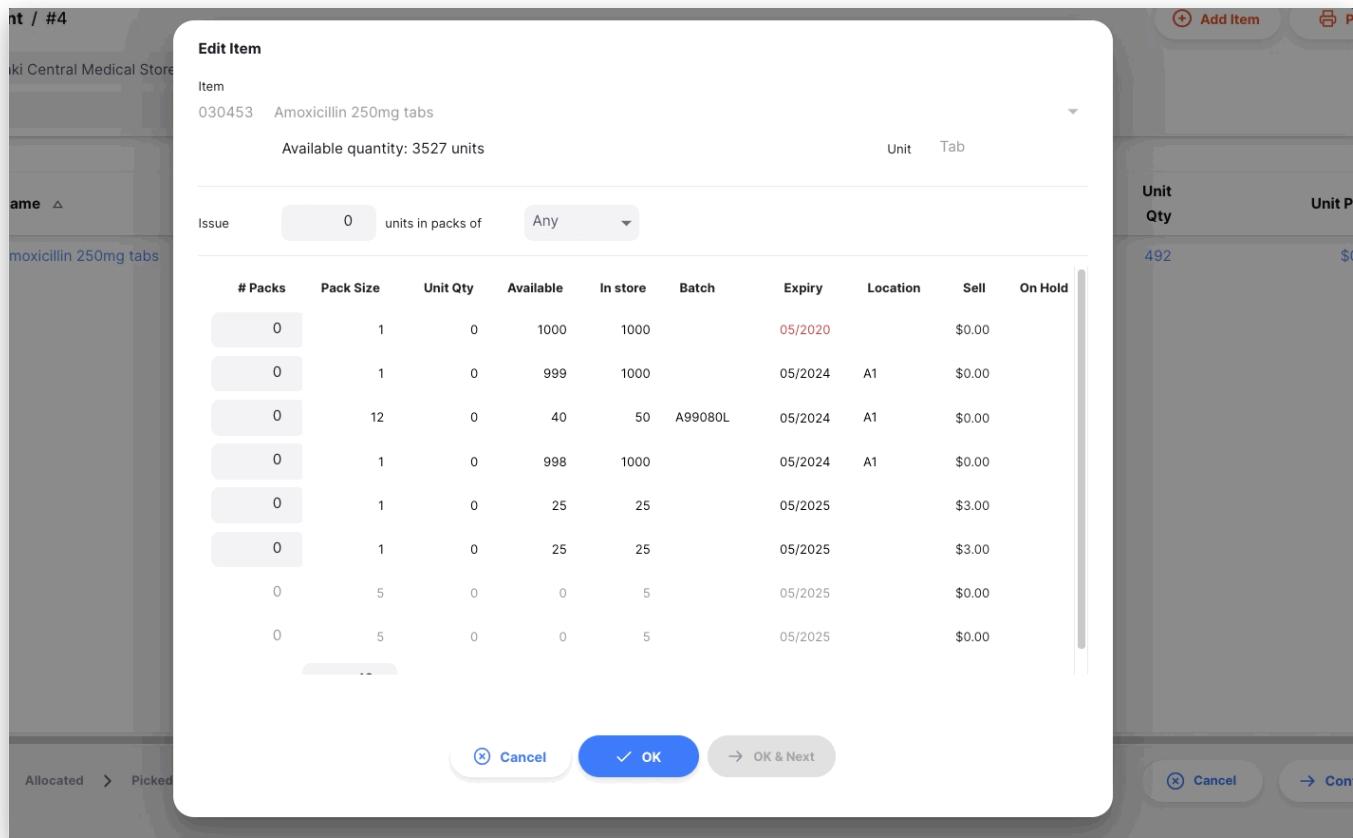
Issue	1200	units in packs of	Any						
# Packs	Pack Size	Unit Qty	Available	In store	Batch	Expiry	Location	Sell	On Hold
0	1	0	1000	1000		05/2020		\$0.00	
996	1	996	999	1000		05/2024	A1	\$0.00	
17	12	204	40	50	A99080L	05/2024	A1	\$0.00	
0	1	0	998	1000		05/2024	A1	\$0.00	
0	1	0	25	25		05/2025		\$3.00	
0	1	0	25	25		05/2025		\$3.00	
0	5	0	0	5		05/2025		\$0.00	
0	5	0	0	5		05/2025		\$0.00	

Note that in this list, the batches which are available for selection are shown first and batches which are not (on hold or no stock available) are shown below and in a grey font.

## Issue a quantity of packs

You can decide to issue a quantity of **packs**. To do this, you can change the value in the **Pack Size** dropdown.

Let's imagine that your customer only wants pack size of 12 units. You can change the dropdown value from 'Any' to '12'.



You are now offered to issue a number of packs of 12 units. Only batch number(s) with a pack size of 12 units can be automatically issued.

In below example, we are issuing 10 packs of 12 units:

Issue	10	packs of	12	▼	units				
# Packs	Pack Size	Unit Qty	Available	In store	Batch	Expiry	Location	Sell	On Hold
10	12	120	40	50	A99080L	05/2024	A1	\$0.00	
0	1	0	1000	1000		05/2020		\$0.00	
0	1	0	999	1000		05/2024	A1	\$0.00	
0	1	0	998	1000		05/2024	A1	\$0.00	
0	1	0	25	25		05/2025		\$3.00	
0	1	0	25	25		05/2025		\$3.00	
0	5	0	0	5		05/2025		\$0.00	
0	5	0	0	5		05/2025		\$0.00	

if you had previously entered a quantity of units and you switch to a quantity a packs, the quantity of units will automatically be converted into the correct quantity of packs.

/ #4
Add Item
Print

**Edit Item**

Item

030453 Amoxicillin 250mg tabs

Available quantity: 3527 units

Issue	120	units in packs of	Any	Unit	Tab
# Packs	Pack Size	Unit Qty	Available	In store	Batch
0	1	0	1000	1000	05/2020
120	1	120	999	1000	05/2024
0	12	0	40	50	A99080L
0	1	0	998	1000	05/2024
0	1	0	25	25	05/2025
0	1	0	25	25	05/2025
0	5	0	0	5	05/2025
0	5	0	0	5	05/2025

Cancel
OK
OK & Next

When a pack size is selected, and stock lines which have a different pack size are not available for selection. As such, those rows are listed lower down in the table and are shown in a grey font, in the same way as other unavailable rows.

## **Manual Allocation**

Regardless if you chose to issue a quantity of units or packs, you can always manually change the quantity at the batch number level directly before pressing on OK.

You simply have to enter or edit the quantity in the # Packs column.

The main Issue Quantity field will be automatically updated with the new quantity.

when allocating quantities at the batch number level, the quantity you enter is always a quantity of packs.

**Add Item**

Item

030453 Amoxicillin 250mg tabs

Available quantity: 3527 units

Issue

1200

units in packs of

Any



# Packs	Pack Size	Unit Qty	Available	In store
0	1	0	1000	1000
996	1	996	999	1000
17	12	204	40	50
0	1	0	998	1000
0	1	0	25	25
0	1	0	25	25
0	5	0	0	5
0	5	0	0	5

Cancel

OK

*Manual allocation at the batch number level.*

## **Issuing when there is not enough stock (Placeholder Line)**

If the amount to be issued is greater than the total stock available from all of the available lines, then the quantity to be issued will automatically be placed in the placeholder field, at the bottom of the list of available batch numbers.

Placeholder lines can be allocated later when new stock arrives. However, all shipment lines must be allocated before confirming the allocation.

Since there is no stock available for *042744-Diazepam Injection 5mg/ml Amp/2ml*, system is issuing a 100 units in the placeholder field.

The screenshot shows the 'Edit Item' dialog for item 042744 - Diazepam Injection 5mg/ml Amp/2ml. The 'Available quantity: 0 units' message is displayed. In the 'Issue' section, '100' is entered in the 'Packs of' field, and '1' is selected in the 'unit' dropdown. The 'Placeholder' field contains '100', which is highlighted with an orange oval and has an orange arrow pointing to it from below. The table below shows one row with '0' in the '# Packs' column and '1' in the 'Unit Qty' column, both of which are also highlighted with orange ovals. The 'Expiry' date is 02/2025. At the bottom, there are 'Cancel', 'OK', and 'OK & Next' buttons.

# Packs	Pack Size	Unit Qty	Available	In store	Batch	Expiry	Location	Sell	On Hold
0	1	0	0	0		02/2025		\$0.00	
Placeholder		100							

When you look at an Outbound Shipment, you can see if a shipment line has not been

allocated or has been partially allocated when it is highlighted in blue.

Outbound Shipment / #3										
Customer Name:		Kamo Regional Warehouse								
Customer Ref:										
Actions										
Code	Name	Batch	Expiry	Location	Unit	Pack Qty	Pack Size	Unit Qty	Unit Price	Line total
030453	Amoxicillin 250mg tabs	[multiple]		A1	Tab	200	1	200	\$0.00	\$0.00
042744	_Diazepam Injection 5mg/ml Amp/2ml				Ampoule	100	1	100	\$0.00	\$0.00

## Confirm Item and Quantity

When you are happy with the quantity, you can either press on:

- the **OK** button. You are redirected to the Outbound Shipment view and your item has been added to the list.
- the **OK & Next** button to add another item right away
- the **Cancel** if you do not want to add the item to the Outbound Shipment anymore

## Editing an Outbound Shipment Line

To edit an shipment line, tap on it. You will be presented with the **Edit Item** window, which is identical to the **Add Item** window, except that the item is already chosen.

### Edit a Shipment Line

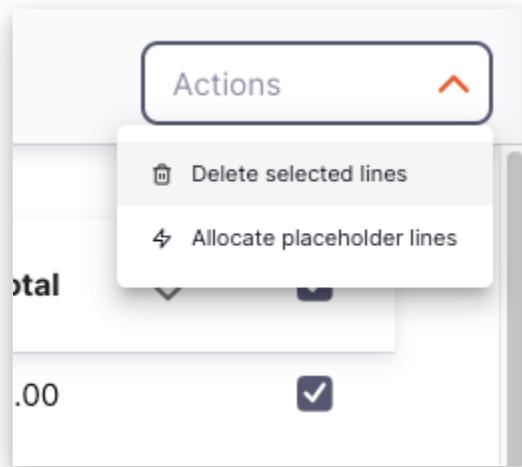
you can edit a shipment line if the shipment has a status lower than **Shipped**.

1. Open the Outbound Shipment you want to edit.
2. Tap on the line you want to edit. An identical window to **Add Item** appears. At this stage:
  - Edit the main **Issue Quantity** field
  - or change the number of packs value at the batch number level

When editing a shipment line, you cannot change the item. You would need to delete the shipment line and to create a new one.

## Delete a Shipment line

1. Open the Outbound Shipment you want to edit.
2. Select the line(s) you want to delete by checking the box(es) on the right of the list.
3. Go to the Actions dropdown menu (top right corner, above the list)
4. Select the action Delete selected lines



In below example, we are deleting item 030063 - Acetylsalicylic Acid 100mg tabs

A screenshot of the Outbound Shipment screen. At the top, it shows 'Outbound Shipment / #4' with a customer name dropdown set to 'Tamaki Central Medical Store'. There are buttons for 'Add Item', 'Print', and 'More'. Below this is a table with columns: Code, Name, Batch, Expiry, Location, Unit, Pack Quantity, Pack Size, Unit Qty, and Unit Price. Two rows are listed: one for 'Acetylsalicylic Acid 100mg tabs' (Code 030063) and another for 'Amoxicillin 250mg tabs' (Code 030453). The row for the salicylic acid item has a checked checkbox in its last column. At the bottom, there are navigation buttons for 'Hold', 'New', 'Allocated', 'Picked', 'Shipped', 'Delivered', 'Verified', and 'Confirm Allocated'. On the far left, there is a vertical sidebar with various icons.

You can delete multiple lines at once. Be sure to review what is selected before performing

the Delete action.

## Processing an Outbound Shipment

### Allocating an Outbound Shipment

Allocation is the process of assigning one or multiple batch numbers from the inventory to a shipment line. In other words, you are assigning stock to your shipment. Once allocated, the stock is reserved for the shipment and thus for your customer.

There are 2 main ways to allocate a shipment line:

1. When adding items, system is automatically assigning stock to the new shipment line when you enter a quantity. If you don't have enough stock, system will add placeholder lines (unallocated lines).
2. Bulk action `Allocate placeholder lines`:
  - Select the lines that you want to allocate by checking boxes on the right on the list
  - In the `Actions` dropdown menu, select `Allocate placeholder lines`. System will check if there is available stock for each selected lines and allocate them using the First to Expire, First Out (FEFO) logic. A notification will let you know whether the operation is successful or not.

You won't be able to process your Outbound Shipment if you have unallocated lines (shipment lines without batch number(s) assigned to it). You can wait for more stock to arrive or you can delete the placeholder lines.

### Confirming an Outbound Shipment's allocation

Once you all your shipments lines have been allocated, you can **confirm the allocation**:

- Current status of the shipment has to be `NEW`
- Lines must be assigned with one or several batch numbers. You won't be able to confirm the allocation if your shipment contains lines without batch numbers assigned to it (placeholder lines).

To confirm the allocation, press the `Confirm Allocated` button.

Code	Name	Batch	Expiry	Location	Unit	Pack Quantity	Pack Size	Unit Qty	Price
030453	Amoxicillin 250mg tabs	A99080K		A1	Tab	50	1	50	\$10.00
047288	Benzyl penicillin Injection 1000000 Unit	BP001			Vial	10	10	100	\$100.00

Once the allocation is confirmed:

- Shipment status is ALLOCATED
- You are now invited to confirm the picking via the Confirm Picked button
- All the items and their quantities will be reserved, meaning that they are no longer available for allocation
- You can print a **pick slip** to be sent to your warehouse so they can start preparing the shipment

## Confirming Outbound Shipment picking

Picking refers to the process where individual items are picked from a fulfillment facility (usually a warehouse or a pharmacy store).

Once a shipment has been allocated, next step is to go get the items to prepare the actual shipment. To help with that, you are able to generate a **pick slip** document. A pickslip indicates:

- What are the items to be picked
- The quantity and batch numbers for each item
- If you manage your inventory with storage locations, where the items are located

Once all items are picked and packed. You can then confirm the picking of the shipment to indicate that it is ready to be dispatched.

To confirm that a shipment has been picked, tap on the **Confirm Picked** button.

Code	Name	Batch	Expiry	Location	Unit	Pack Quantity	Pack Size	Unit Qty	P
030453	Amoxicillin 250mg tabs	A99080K		A1	Tab	51	1	51	\$
047288	Benzyl penicillin Injection 1000000 Unit	BP001			Vial	10	10	100	\$

Once picking is confirmed:

- Shipment status is now **PICKED**
- You are now invited to confirm the shipping via the **Confirm Shipped** button
- An **Inbound Shipment** has been generated and is now visible to your customer

At this stage, you are still able to edit shipment lines, to add items or to delete existing lines. However, if picking has been confirmed, you need to make sure to inform your fulfillment facility of any change so they can make sure that the shipment is still correct.

## Confirming the Outbound Shipment shipping

The last step to issue stock with an Outbound Shipment is to confirm that stock has been shipped. This a critical step cause when goods are confirmed as shipped, they are no longer part of your inventory records.

To confirm that an Outbound Shipment has been shipped, tap on the **Confirm Shipped**

button.

Once shipping has been confirmed:

- Shipment status is now SHIPPED
- Goods are no longer part of your inventory
- You can no longer edit shipment lines
- You can no longer delete the shipment
- You can print a **delivery note** or an **invoice**

## Tracking Progress of Outbound Shipments

If your customer is also using mSupply, you will be able to see when they'll receive your shipments:

- status will become DELIVERED when goods are received: your customer confirmed that they received your goods
- status will become VERIFIED when shipment has been verified by your customer. Goods are now part of their inventory

## Viewing an Outbound Shipment

When viewing a specific shipment, you can view the batches on that shipment grouped by item or with each batch listed separately. To change the view mode, click the Group by item switch.

When grouped by item, you can expand the item to see individual batches, or use the expand in the table header to expand all grouped rows. If you click on an item you will also see all selected batches, as shown in this example:

Outbound Shipment / #3

Add Item Print More

Customer Name: Kawakawa Health Centre

Customer Ref:

Actions

Group by Item

Code	Name	Batch	Expiry	Location	Unit	Pack Qty	Pack Size	Unit Qty	Unit Price	Line total	▼	<input type="checkbox"/>
030453	Amoxicillin 250mg tabs	[multiple]		B3	Tab			355	\$0.896	\$17.50	▼	<input type="checkbox"/>
041011	Artesunate Injection Ampoule/60 mg	A900			Vial	4	99	396	\$0.00	\$0.00		<input type="checkbox"/>
049543	Vancomycin HCL Injection Vial/500mg	JDHH898		B3	Vial	5	25	125	\$0.058	\$7.25		<input type="checkbox"/>

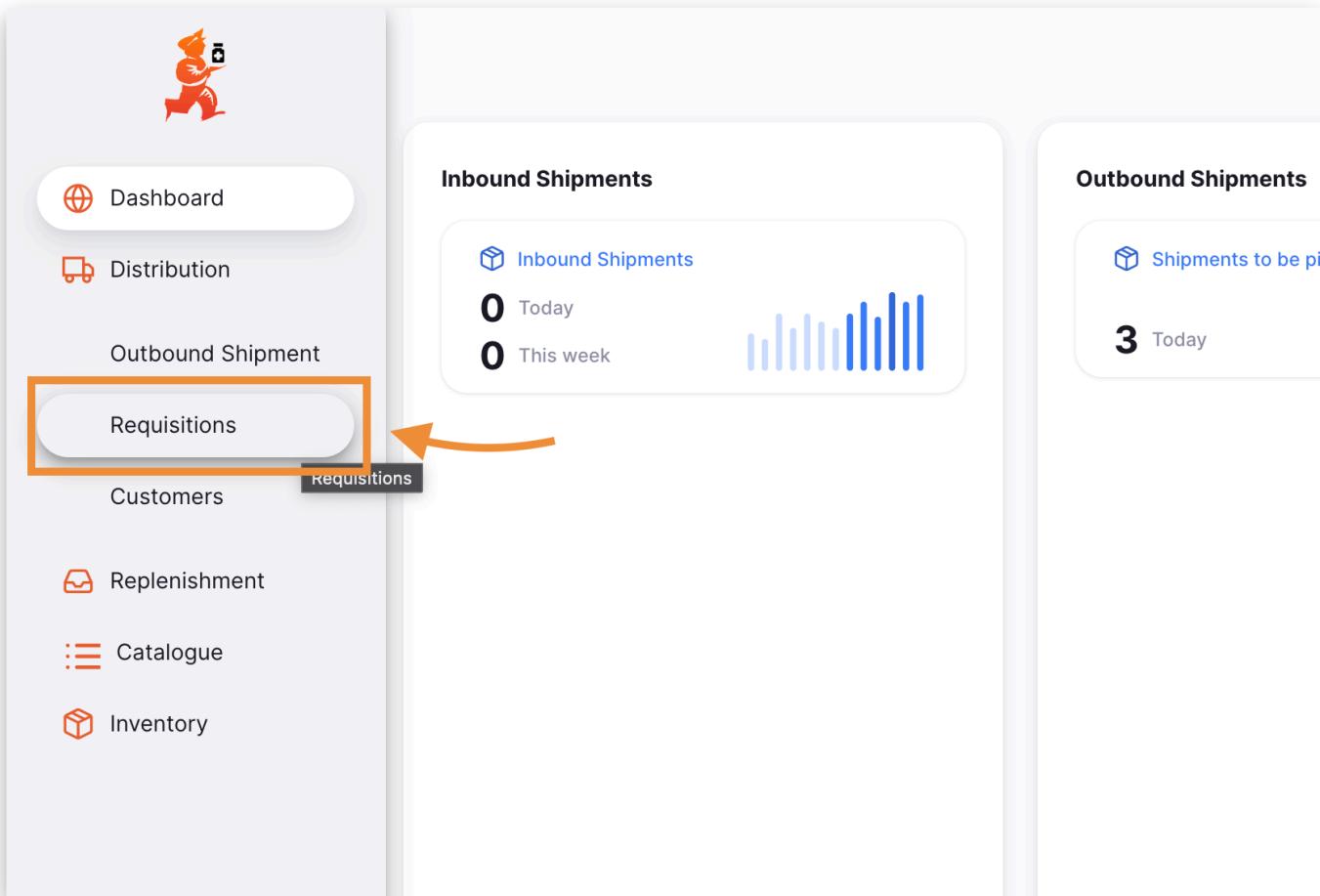
# Requisitions

Managing your customers' orders

When a customer orders stock from you, they create an **Internal Order** in their store. This will appear as a **Requisition** in your store.

## Viewing Customers' Requisition

To know if you have received requisitions from your customers, go to Distribution > Requisition



You should see a list of all requisitions sent by your customers.

From this screen you can:

- View a list of Requisitions

- Export Requisitions to a .csv file

Requisitions					 Export
Name	Number	Created	Status	Comment	
● Hufflepuff Health Centre	-1	18/02/2022	label.sent	From request requisition12	
● Opua Health Centre	-1	17/02/2022	label.sent	From request requisition4	
● Opua Health Centre	-1	17/02/2022	label.sent	From request requisition5 (Replenishing expired stock)	
● Opua Health Centre	1	06/03/2022	New		
● Opua Health Centre	2	09/03/2022	New		

Showing 1-5 of 5 < 1 >

## Requisition list

1. The list of Requisitions is divided into 5 columns:

### Column Description

**Name** Name of the Customer

**Number** Reference Number of the requisition

**Created** Creation date of the requisition

**Status** Current Status of the requisition

**Comment** Comment for the requisition

1. The list can display a fixed number of requisitions per page. On the bottom left corner, you can see how many requisitions are currently displayed on your screen.

Showing 1-20 of 21

3. If you have more than 20 requisitions, you can navigate to the other pages by tapping on the page number or using the right of left arrows (bottom right corner).

< 1 2 3 >

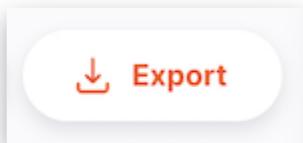
## Search by comment

You can filter the list of requisitions by comment. This can be useful if you're looking for one particular requisition!

Start typing in the `Search by comment` field (on the left, just above the list headers). All the requisitions which have a comment matching the entered text will appear in the list.

## Exporting Requisitions

The list of Requisitions can be exported to a comma separated file (csv). Simply click the export button (on the right, at the top of the page)



and the file will be downloaded. The export function will download all Requisitions, not just the current page, if you have more than 20 of them. Requisitions are exported using sort order selected in the table, though of course you could easily sort the list in Excel or whatever you open the .csv file with!

# Customers

View and manage your customers

At the moment, you are only able to view your customers and their information. In the future, you will be able to create and edit your customers (provided you have the authorisation to do so!).

## Viewing Customers

To view the customers of your store, go to the Distribution menu and click on Customers.

The screenshot shows a software application interface. On the left is a sidebar with various menu items and icons:

- Dashboard (globe icon)
- Distribution (truck icon)
- Outbound Shipment
- Requisitions
- Customers** (highlighted with a red arrow)
- Replenishment (box icon)
- Catalogue (list icon)
- Inventory (cube icon)

The main panel displays a list of customers under the heading "Customers". The list includes:

Name
Kamo Regional Warehouse
Tamaki Central Medical Store

A message at the bottom of the list area reads "Showing 1-2 of 2".

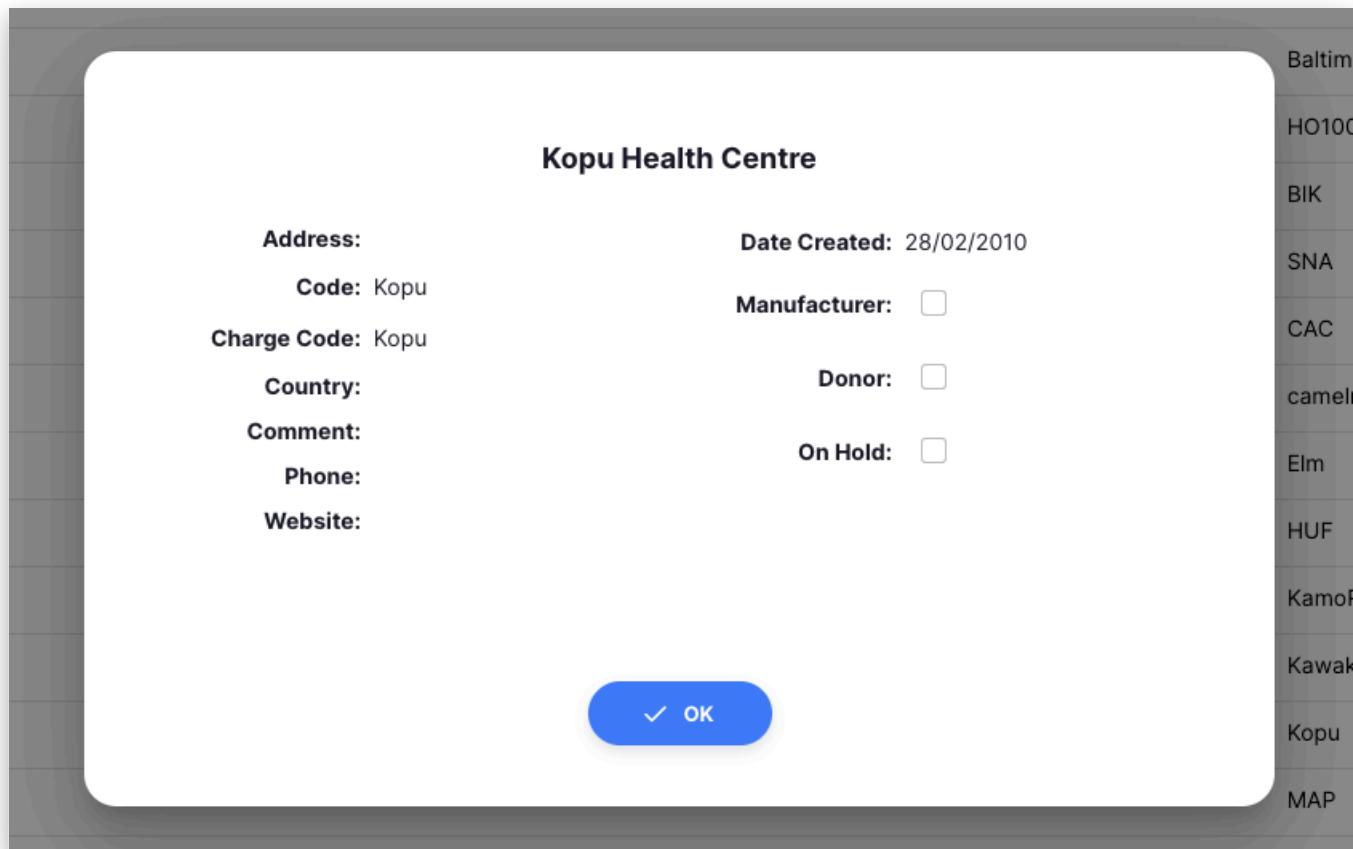
You will be presented with a list of customers visible to your store.

You can only see customers that are visible for your store. There may be more customers in our organisation.

If you don't find the customer you are looking for, contact your administrator.

## Viewing Customer Details

Tap on one of your customers to see their details.



# Inbound Shipments

Inbound Shipments can be used to receive stock from suppliers.

If you have used mSupply in the past, you may be familiar with the term **Supplier Invoice** instead of Inbound Shipment.

All received goods should be recorded in mSupply either by:

- Manually creating an Inbound Shipment (manual Inbound Shipment)
- Working with an Inbound Shipment that has been created automatically as a result of a stock transfer from another store in your mSupply

## Viewing Inbound Shipments

### Go to the Inbound Shipments Menu

The screenshot shows the mSupply mobile application interface. On the left is a vertical navigation menu with the following items:

- Dashboard
- Distribution
- Replenishment
- Inbound Shipment** (this item is highlighted with a white background and a red arrow points to it from the bottom right)
- Internal Orders
- Suppliers
- Catalogue
- Inventory

The main content area is titled "Inbound Shipment" and features a search bar labeled "Search by name". Below the search bar is a table listing three inbound shipments:

Name	Status
Kawakawa Health Centre	Delivered
Opua Health Centre	Shipped
Tamaki Central Medical Store	Picked

At the bottom of the main screen, it says "Showing 1-3 of 3".

To access the **Inbound Shipment** menu:

1. Go to the Replenishment menu in the navigation panel
2. Click on Inbound Shipment

## Inbound Shipments list

First thing you see is a list of existing Inbound Shipments.

The Inbound Shipments list is divided into 7 columns:

Column	Description
<b>Name</b>	Name of the Customer
<b>Status</b>	Current Status of the shipment
<b>Number</b>	Reference Number of the shipment
<b>Created</b>	Creation date of the shipment
<b>Confirmed</b>	Confirmation date of the shipment
<b>Comment</b>	Comment for the shipment
<b>Total</b>	Total value of the shipment

2. The list can display **20 shipments per page**. On the bottom left corner, you can see how many shipments are currently displayed on your screen.

Showing 1-20 of 21

3. If you have more than 20 shipments, you can navigate to the other pages by clicking on the page number or using the right or left arrows (bottom right corner).



## Search by Supplier Name

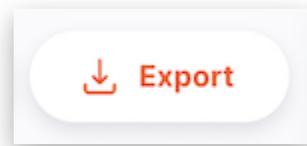
You can filter the list of shipments by supplier name. This can be useful if you're looking for one particular shipment!

Type the name of a supplier in the Search by name field (on the left, just above the list

headers). All the shipments for this supplier will appear in the list.

## Exporting Inbound Shipments

The list of Inbound Shipments can be exported to a comma separated file (csv). Simply click the export button (on the right, at the top of the page)



and the file will be downloaded. The export function will download all Inbound Shipments, not just the current page, if you have more than 20 of them. Shipments are exported using sort order selected in the table, though of course you could easily sort the list in Excel or whatever you open the .csv file with!

## Delete an Inbound Shipment

You can delete a shipment from the Inbound Shipment list.

1. Select the shipment that you want to delete by checking the box on the left end of the list. You can select more than one shipments to be deleted. You can even select them all using the master checkbox in the list headers.
2. Open the Select dropdown (top right corner, above the list) and select Delete selected lines.

A notification confirms how many shipments were deleted (bottom left corner).

You can only delete Inbound Shipments with a status NEW.

## Creating a new manual Inbound Shipment

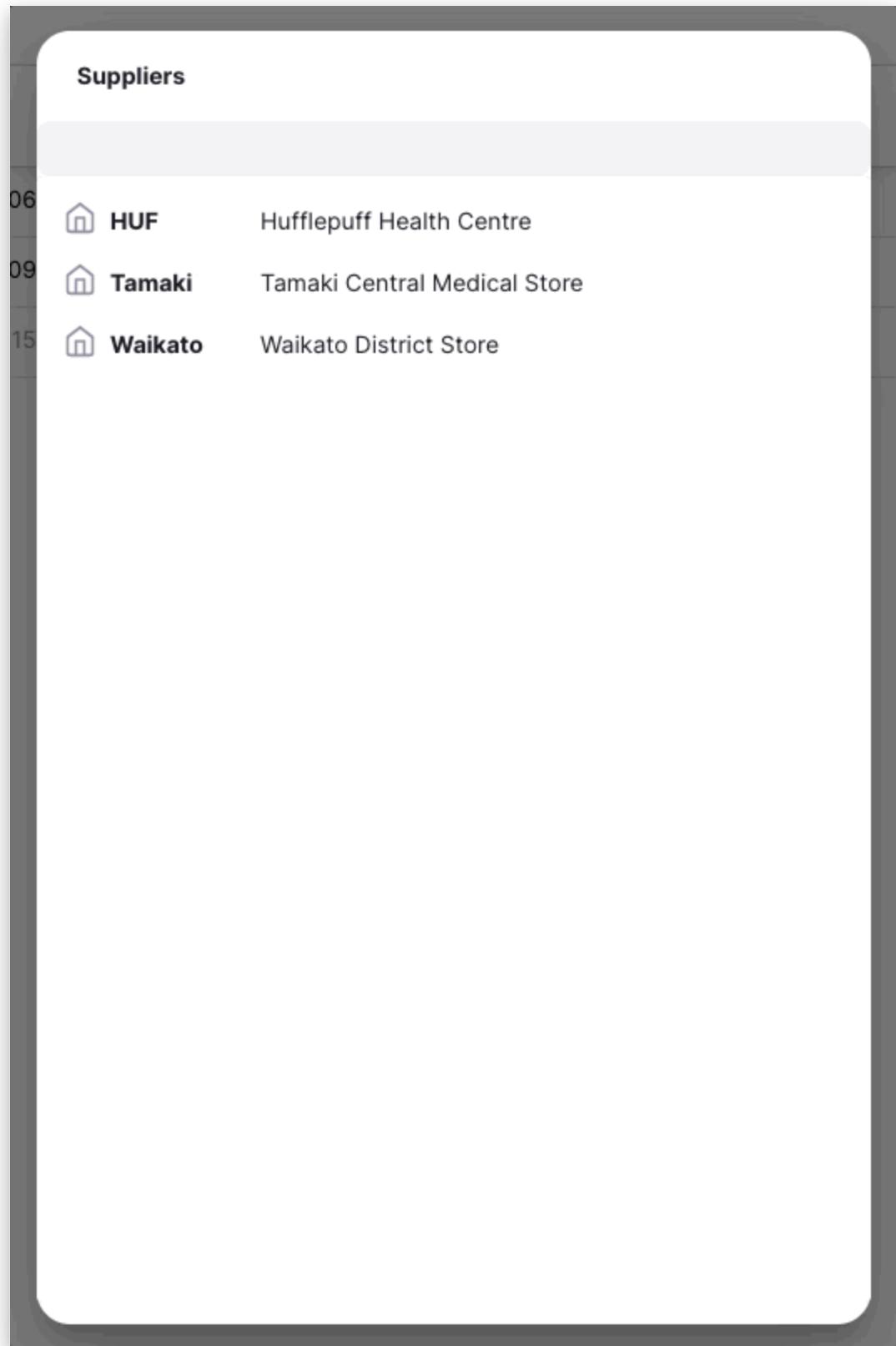
1. Go to Replenishment > Inbound Shipment
2. Press the New Shipment button, in the top right corner
3. A new window Suppliers opens, inviting you to select a supplier

## Select a Supplier

1. In the Suppliers window, you will be presented with a list of suppliers. You can select your supplier from the list or you can type as much of a supplier name.

You can tell if a supplier is also using mSupply in their store. If they do, you will see icon like this (  ) next to the supplier code.

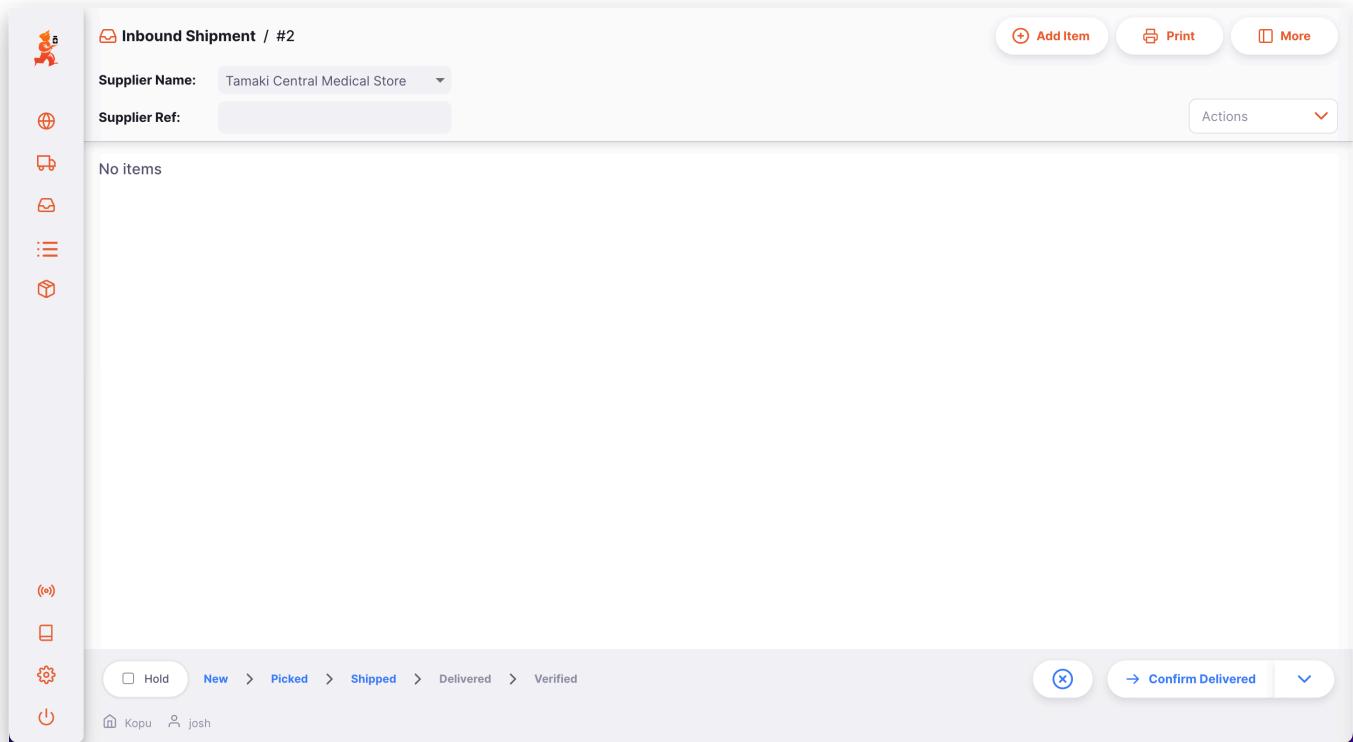
In below example, we are receiving stock from **Tamaki Central Medical Store**.



2. Once you have selected a supplier, your Inbound Shipment is created.

If everything went well, you should see the name of your supplier in the top left corner and

current status should be SHIPPED.



When you create a **new** manual Inbound Shipment, mSupply assumes that shipment has already been shipped by the supplier and is coming your way.  
That's why first status of a manual Inbound Shipment is always SHIPPED.

## Edit the Supplier Name

If you have selected the wrong supplier, you can change the supplier name in the **Supplier Name** field or select one the dropdown list:

In below example, we are replacing **Tamaki Central Medical Store** by **Waikato District Store**.



## Enter a Supplier Reference

Once your Inbound Shipment has been created, you can capture a supplier reference in the Supplier Ref field, if they have one (eg. \* PO#1234567 \*)

## View or edit the Inbound Shipment Information Panel

The Information Panel allows you see or to edit information about the Inbound Shipment. It is divided in multiple sections:

- Additional Info
- Related Documents
- Invoice Details
- Transport Details

We are planning to add more sections in the future as Open mSupply grows.

### How to open and close the Information Panel ?

To open the Information Panel, you can tap on the More button, located in the top right corner of the Inbound Shipment view.

You can close by tapping on the Close button, on the top right corner of the information panel.

Inbound Shipment / #2

Supplier Name: Opua Health Centre

Reference:

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

Code	Name	Batch	Expiry	Location	Sell	Pack Size	Unit Qty	Pack Qty
030453	Amoxicillin 250mg tabs	PORRIDGE		Cool Room 1	1	10	10	
041011	Artesunate Injection Ampoule/60 mg	A900			99	792	8	
12763	Glipizide 5 mg tablets	G123			10	100	10	

Hold    New    > Picked    > Shipped    > Delivered    > Verified

## Additional Info

In the **Additional Info** section, you can:

- See who created the Inbound Shipment (name of the user)
- View and edit the Inbound Shipment color. To edit the color, tap on the colored circle and select a color from the pop-up
- Write or edit a comment

## Related Documents

In the **Related Documents** section, you can see other related transaction document for the Inbound Shipment.

If your Inbound Shipment was created to fulfill a **Internal Order**, the reference number of your order would appear in this section.

In the future, we would also include other documents such as temperature records, transportation documents or pickslips.

## Invoice Details

In this section, you will see by default the total cost price of the items listed in the Inbound Shipment.

You can also add a **Service charges** if you wish to add other charges such as Freight Costs. To add a Service charges to the Invoice Details:

1. Tap on the **Edit Service Charges** button. A new window opens.
2. Tap on the **Add charge** button on the new window. A new line appears in the list of charges. You tap on **Cancel** if you do not wish to add anything.
3. **Name:** select a service charges in the dropdown list. You can customise the list of available charges. Contact your administrator.
4. **Comment:** You can add a comment to provide further details about the new charge
5. **Amount:** Enter the amount of the charge
6. **Tax:** Enter a % of tax for the charge
7. **Total:** The total field is automatically calculated based on the Amount and the Tax percentage
8. **Delete:** You can tap on the **Delete** icon to delete the charge

In this section, you can also edit the tax rate (%) for the cost price. Tap on the pencil icon and enter

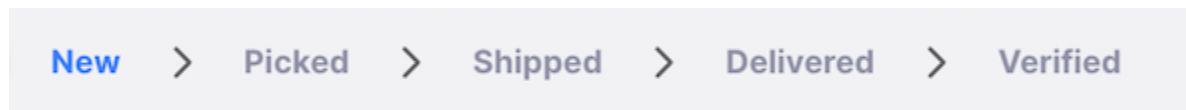
## Transport Details

In this section, you can see or edit a transport reference number (eg. a booking or a tracking reference number).

## Inbound Shipment Status Sequence

The status sequence is located at the bottom left corner of the Inbound Shipment screen.

Passed statuses are highlighted in blue, next statuses appear in grey.



Status Sequence: current status is New.

New > Picked > Shipped > Delivered > Verified

Status Sequence: current status is Shipped.

There are 5 status for the Inbound Shipment:

Status	Description
New	This is the first status when you create a new manual Inbound Shipment
Picked	Supplier has confirmed that shipment is picked and ready to ship (applies only to automatically created shipments)
Shipped	Shipment has been shipped and goods are now in transit (applies only to automatically created shipments)
Delivered	When you confirm that the shipment has been delivered
Verified	When you have verified the inbound shipment

You probably noticed that two of the status values only apply to automatically created shipments. These are created by the system when another store in the system creates an Outbound Shipment to deliver stock to your store. If this is the case you'll see a message near the top of the page:

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

If, however, you've created an Inbound Shipment manually, then the following message shows:

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

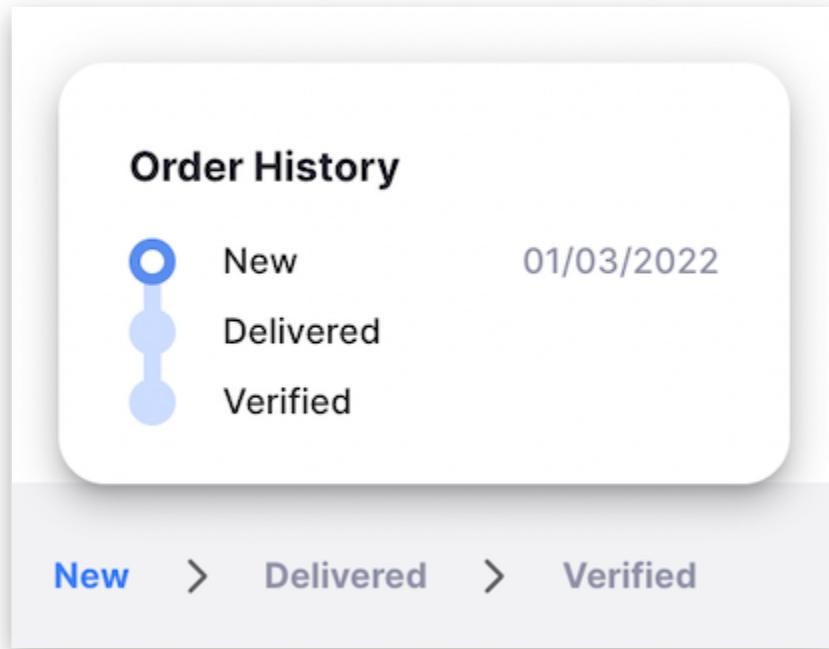
and you'll see that the status bar has only the status values which apply to this type of shipment.

New > Delivered > Verified

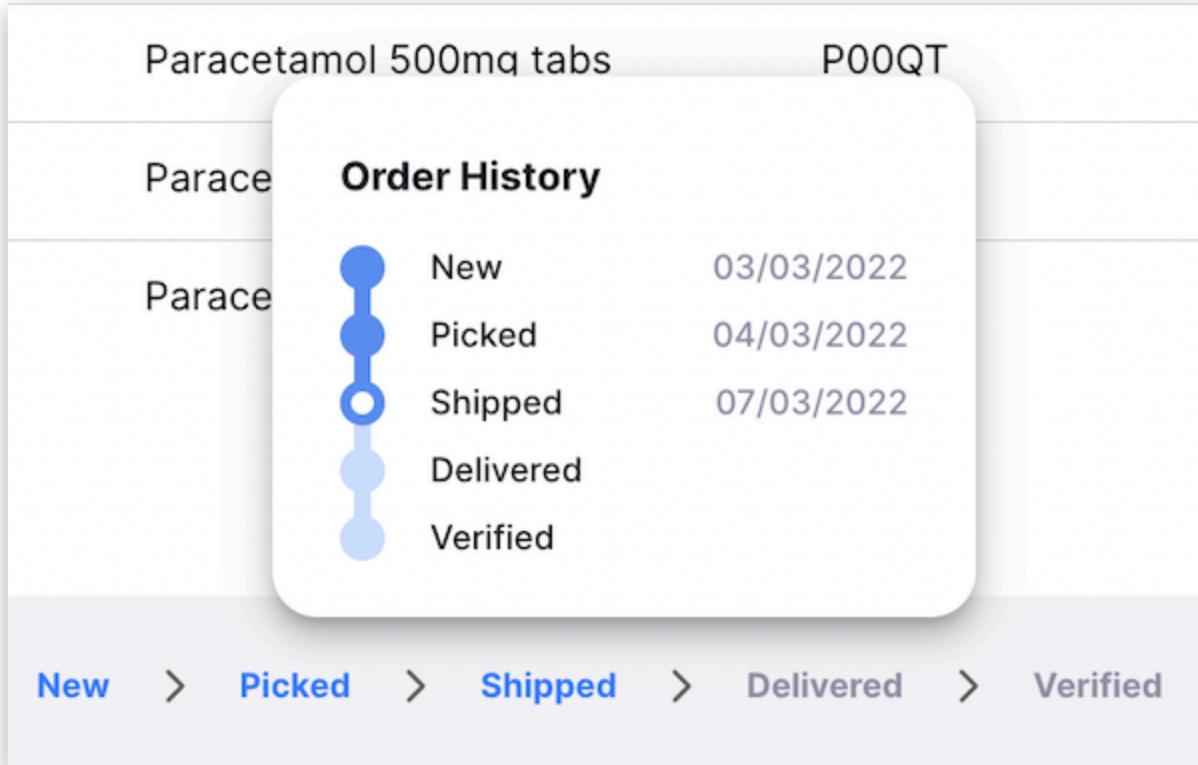
Status Sequence: current status is New.

If you hover over the status sequence, a shipment history window appears. You can see the date when a shipment was updated from one status to another.

This manual shipment has been created on 03/03/2022



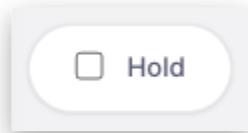
This automatic shipment has been created on 03/03/2022, allocated on 04/03/2022 and picked on 07/03/2022



## Hold checkbox

Located on the bottom left corner, on the left of the status sequence.

Check the `Hold` checkbox prevents the Inbound Shipment from being updated to the next status.



## Cancel and Confirm button

### Cancel Button

Click on the `Cancel` button to quit the Inbound Shipment view and return to the Inbound Shipments list.

## Confirm Button

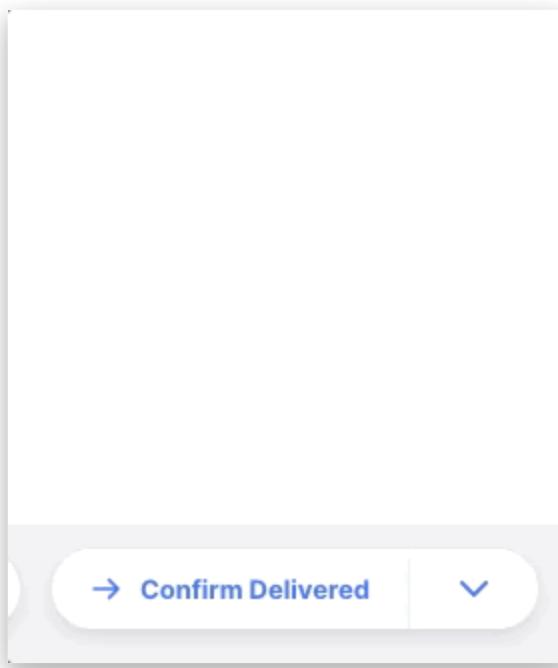
The Confirm button is the button to update the status of a shipment. The status which you can confirm depends on the current status of the shipment and follows the sequence shown below.

When managing an Inbound Shipment, you can only confirm it as Delivered or Verified.

Confirm...	Current Status	Next Status
<b>Confirm Delivered</b>	Shipped	Delivered
<b>Confirm Verified</b>	Delivered	Verified

You don't have to update a shipment to next status in the sequence. You can choose to skip some of them to go directly to Confirm Verified for example.

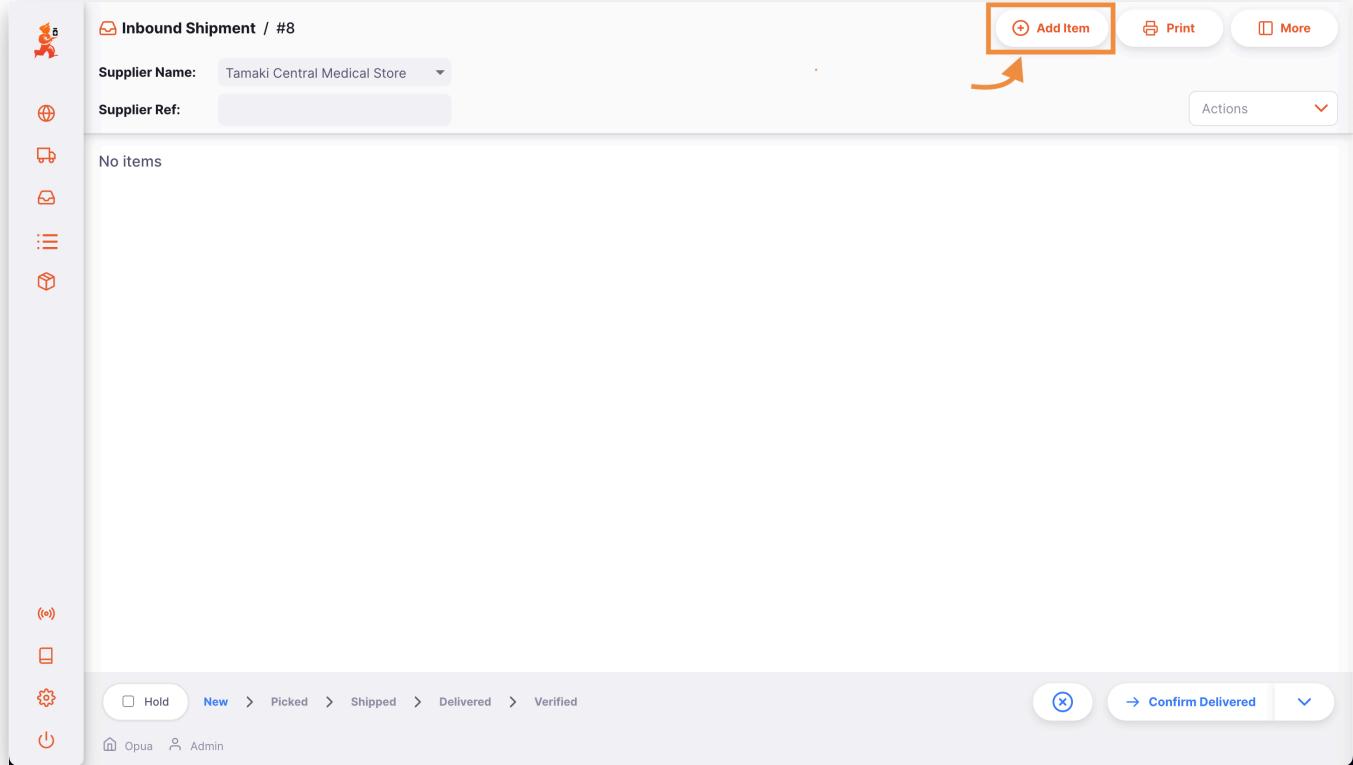
As demonstrated below, tap on the down arrow of the Confirm button and select the status you want the shipment to be updated to.



## Adding lines to an Inbound Shipment

To add a line, tap on the Add Item button located in the top left corner of your screen.

A new Add Item window opens.

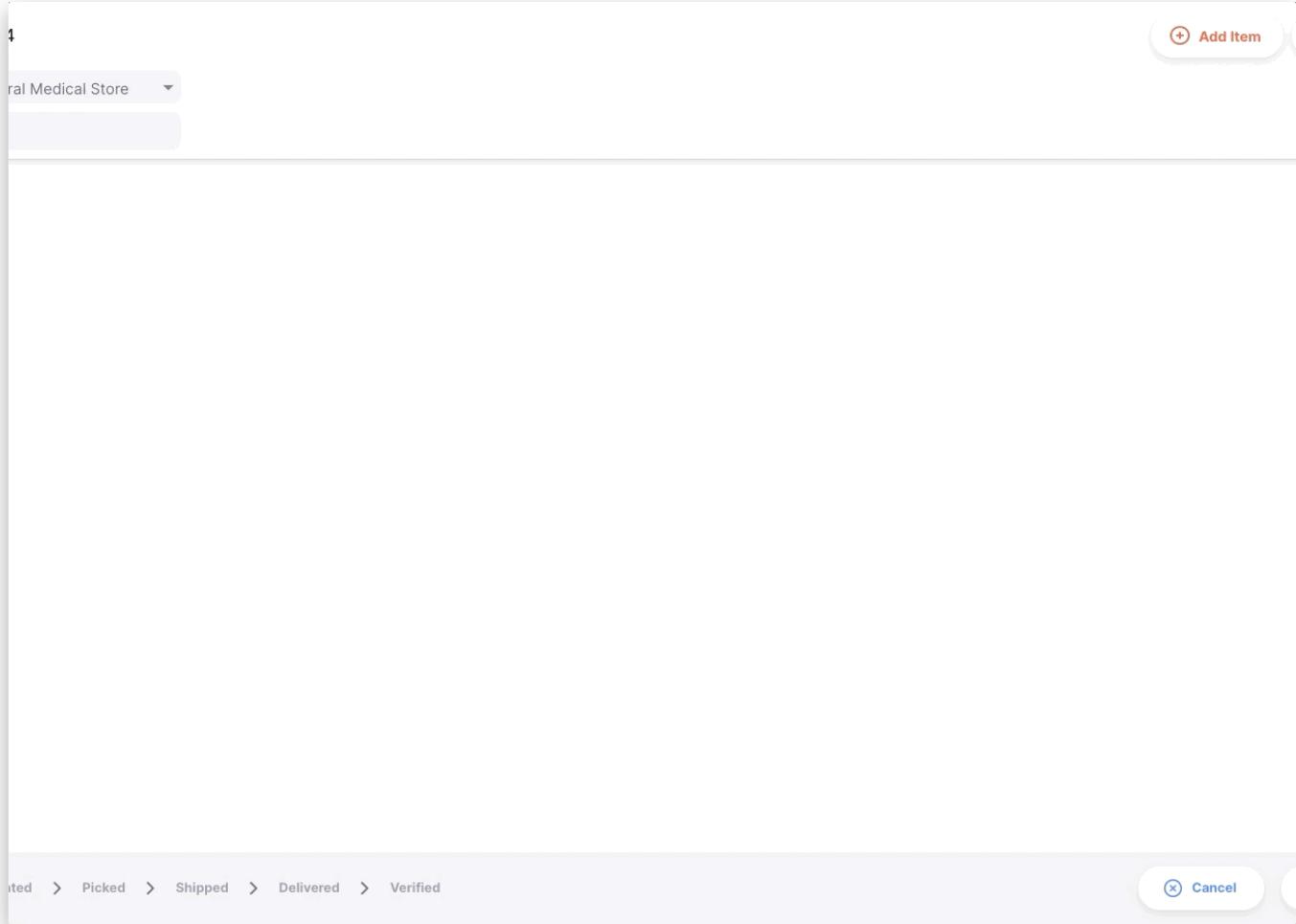


## Select an Item

In the Add Item window, you can look up an item by:

- Reading through the list of available items
- or by typing some or all of an item name
- or by typing some or all of an item code

Once your item is highlighted, tap on the name or press Enter.



## Quantities tab

In the Quantities tab, you can update the following fields:

1. **Batch:** Type here the batch number. Leave blank if item is not managed with batch number.
2. **Expiry:** The expiry date of the batch number. Leave blank is not applicable
3. **# Packs:** The quantity of packs you are receiving
4. **Pack Size:** The quantity of units per pack (by default, pack size is 1)
5. **Unit Qty (read-only):** Automatically calculated based on # Packs and Pack Size ([# Packs] x [Pack Size])
6. If you are receiving more than one batch number for the same item, you can tap on the Add Batch button

In below example, we are receiving 2 batch numbers for item 030453 - *Amoxicillin 250mg tabs* with a different pack size.

**Add Item**

Item 030453 Amoxicillin 250mg tabs

Unit Tab

**Quantities (△+1) Pricing (△+2) Location (△+3)**

**Add batch**

Batch	Expiry	# Packs	Pack Size	Unit Qty
BTSU0038	05/2026	100	1	100
BTSU0039	06/2027	10	10	100

**Cancel** **OK** **OK & Next**

## Pricing tab

On the second tab, Pricing, you can update the following fields (all are optional):

- **Sell:** The selling unit price of the item (default value is 0)
- **Cost:** The purchasing unit price of the item (default value is 0)
- **Unit Qty** (read-only): Total number of units for the batch number
- **Line Total** (read-only): Total purchasing value for the batch number ( $[Unit\ Qty] \times [Cost]$ )

Sell & Cost prices are per units and not per pack.

In below example, sell price \$12 per unit and cost price is \$10 per unit.

**Edit Item**

Item 030453 Amoxicillin 250mg tabs

Unit Tab

Quantities (Δ+1) **Pricing (Δ+2)** Location (Δ+3) Add batch

Batch	Expiry	Sell	Cost	Unit Qty	Line total
BTSU0038	05/2026	\$12	\$10	100	\$1,000.00
BTSU0039	06/2027	\$12	\$10	100	\$1,000.00

Cancel OK OK & Next

## Location tab

In the third tab, Location, you can select a storage location to assign the batch number to a location in your storage facility.

Simply select a storage location from the Location dropdown menu.

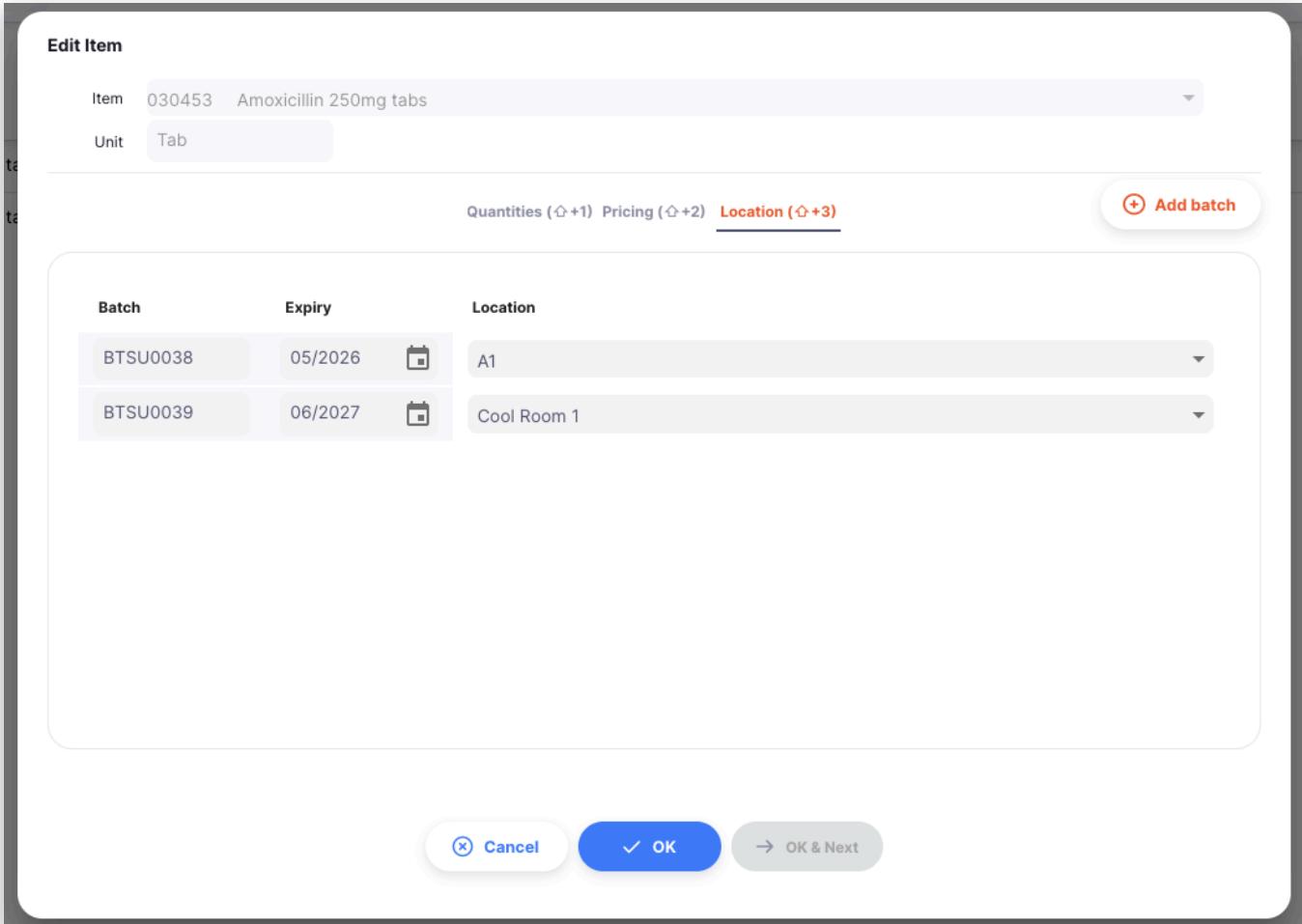
**Edit Item**

Item 030453 Amoxicillin 250mg tabs  
Unit Tab

Quantities (△+1) Pricing (△+2) **Location (△+3)** + Add batch

Batch	Expiry	Location
BTSU0038	05/2026	A1
BTSU0039	06/2027	Cool Room 1

Cancel OK OK & Next



Don't know the storage location yet ? You don't have to capture it right away. You can update the storage location at any time if you haven't confirmed the verification yet.

## Confirm item and quantities

When you're done, you can add the new line by tapping on:

- OK if you don't want to add another line to your shipment
- OK & Next if you have other lines to create

Otherwise, you can tap on Cancel and your changes won't be saved.

## Editing an Inbound Shipment line

To edit an Inbound Shipment line, simply tap on it. You will be presented with the Edit Item window, which is identical to the Add Item window, except that the item is already chosen

and cannot be modified.

## Edit a Shipment Line

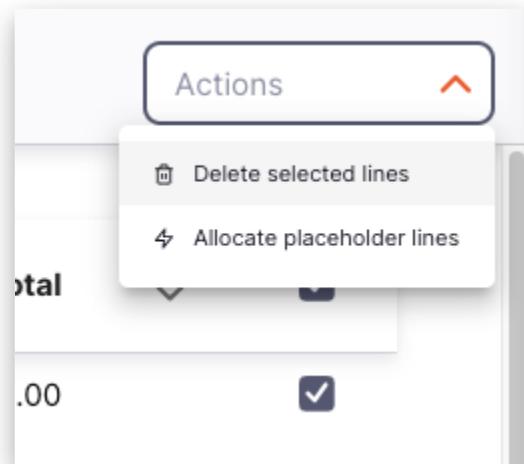
you can edit a shipment line if the shipment has a status higher lower than VERIFIED.

1. Open the Inbound Shipment you want to edit
2. Tap on the line you want to edit. An identical window to Add Item appears. At this stage:
  - Edit the main Issue Quantity field
  - or change the number of packs value at the batch number level

When editing a shipment line, you cannot change the item. You would need to delete the shipment line and to create a new one.

## Delete a Shipment line

1. Open the Inbound Shipment that you would like to edit
2. Make sure that status is not yet VERIFIED
3. Select the line(s) you want to delete by checking the box(es) on the right of the list
4. Go to the Actions dropdown menu (top right corner, above the list)
5. Select the action Delete selected lines



In below example, we are deleting *item 030063 - Acetylsalicylic Acid 100mg tabs*

Code	Name	Batch	Expiry	Location	Unit	Pack Quantity	Pack Size	Unit Qty	Unit Price
030063	Acetylsalicylic Acid 100mg tabs	[multiple]			Tablet			2000	\$0.00
030453	Amoxicillin 250mg tabs	A99080K		A1	Tab	50	1	50	\$0.00

You can delete multiple lines at once. Be sure to review what is selected before performing the Delete action.

## Receiving stock with an Inbound Shipment

### Confirm the delivery of the shipment

Whether your Inbound Shipment is **manual** or **automatic**, the first step to receive the goods is to confirm the delivery.

At this stage, you don't have to check if quantities or other information are correct, you just have to acknowledge that you have received the goods from your supplier.

To confirm that an Inbound Shipment has been delivered, click on the **Confirm Delivered** button.

In case your Inbound Shipment is **automatic**, you cannot confirm its delivery unless the supplier has confirmed its shipment. In other words, your shipment status has to be **SHIPPED** before you can confirm that you have received the goods.

## Verify your Inbound Shipment

Verification is the last step to receive goods in mSupply. At this stage, you can check what you have received and make sure that that information in mSupply are correct.

You have the possibility to verify the following information:

- Batch numbers and their expiry dates
- Quantity of packs and pack size
- Pricing information: cost and sell prices

You can also capture where received goods are to be stored in the **Location** tab.

Once all information have been captured or verified, you can confirm the Shipment as **VERIFIED** by tapping on the **Confirm Verified** button.

Once you have done this:

- Goods are now part of your inventory
- Shipment status is now **VERIFIED**
- You can no longer edit shipment lines
- You can no longer delete the shipment

## Viewing an Inbound Shipment

When viewing a specific shipment, you can view the batches on that shipment grouped by item or with each batch listed separately. To change the view mode, click the **Group by item** switch.

When grouped by item, you can expand the item to see individual batches, or use the **expand** in the table header to expand all grouped rows. If you click on an item you will also see all selected batches, as shown in this example:

Inbound Shipment / #2

Add Item Print More

Supplier Name: Opua Health Centre

Reference:

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

Actions

Group by Item

Code	Name	Batch	Expiry	Location	Sell	Pack Size	Unit Qty	Pack Qty	▼	<input type="checkbox"/>
030453	Amoxicillin 250mg tabs	PORRIDGE		Cool Room 1		1	10	10	<input type="checkbox"/>	<input type="checkbox"/>
041011	Artesunate Injection Ampoule/60 mg	A900				99	792	8	<input type="checkbox"/>	<input type="checkbox"/>
12763	Glipizide 5 mg tablets	G123				10	100	10	<input type="checkbox"/>	<input type="checkbox"/>

Hold New > Picked > Shipped > Delivered > Verified

Close

Kopu Admin

# Internal Orders

Internal Orders go by several other names in certain countries or systems:

- Requisitions
- Orders
- Report & Requisition
- R&R

Internal Orders are a way to support users in requesting new stock from another store.

## Viewing Internal Orders

If you would like to order some stock from your supplier:

1. Navigate to the Replenishment menu
2. Tap on Internal Orders

**Internal Orders**

Search by comment...

Name	Nu
Hufflepuff Health Centre	3
Hufflepuff Health Centre	9
Hufflepuff Health Centre	2
Kawakawa Health Centre	7
Kawakawa Health Centre	11
Kawakawa Health Centre	8
Kopu Health Centre	5
Kopu Health Centre	4
Kopu Health Centre	1

You will see a list of all existing internal orders:

**Internal Orders**

Search by name

Name	Number	Created	Status	Comment	
Hufflepuff Health Centre	3	17/02/2022	Sent		<input type="checkbox"/>
Hufflepuff Health Centre	9	17/02/2022	Draft	Number 9..	<input type="checkbox"/>
Hufflepuff Health Centre	2	17/02/2022	Sent		<input type="checkbox"/>
Kamo Regional Warehouse	8	09/07/2020	Sent		<input type="checkbox"/>
Kamo Regional Warehouse	13	08/04/2022	Draft		<input type="checkbox"/>
Kamo Regional Warehouse	13	04/04/2022	Draft		<input type="checkbox"/>
Kamo Regional Warehouse	3	09/07/2020	Sent		<input type="checkbox"/>
Kamo Regional Warehouse	14	11/04/2022	Draft		<input type="checkbox"/>
Kamo Regional Warehouse	14	11/04/2022	Draft		<input type="checkbox"/>
Kawakawa Health Centre	7	17/02/2022	Sent		<input type="checkbox"/>
Kawakawa Health Centre	8	17/02/2022	Sent		<input type="checkbox"/>
Kawakawa Health Centre	11	18/02/2022	Sent		<input type="checkbox"/>
Kopu Health Centre	5	17/02/2022	Sent	Replenishing expired stock	<input type="checkbox"/>
Kopu Health Centre	4	17/02/2022	Sent		<input type="checkbox"/>

Showing 1-20 of 22

Opua Admin

You can use the Search by comment field to filter the list by the comments of the internal orders:

**Internal Orders**

Search by comment...

Name	Number	Status	Comment	
Hufflepuff Health Centre	9	Draft	Number 9..	<input type="checkbox"/>
Hufflepuff Health Centre	3	Sent		<input type="checkbox"/>
Hufflepuff Health Centre	2	Sent		<input type="checkbox"/>
Kawakawa Health Centre	7	Sent		<input type="checkbox"/>
Kawakawa Health Centre	11	Sent		<input type="checkbox"/>
Kawakawa Health Centre	8	Sent		<input type="checkbox"/>
Kopu Health Centre	5	Sent	Replenishing expired stock	<input type="checkbox"/>
Kopu Health Centre	4	Sent		<input type="checkbox"/>
Kopu Health Centre	1	Sent	Monthly order	<input type="checkbox"/>
Kopu Health Centre	4	Sent		<input type="checkbox"/>
Kopu Health Centre	6	Draft	Urgent	<input type="checkbox"/>
Tamaki Central Medical Store	1	Draft		<input type="checkbox"/>
Tamaki Central Medical Store	12	Draft	Testing chart data	<input type="checkbox"/>

Showing 1-13 of 13

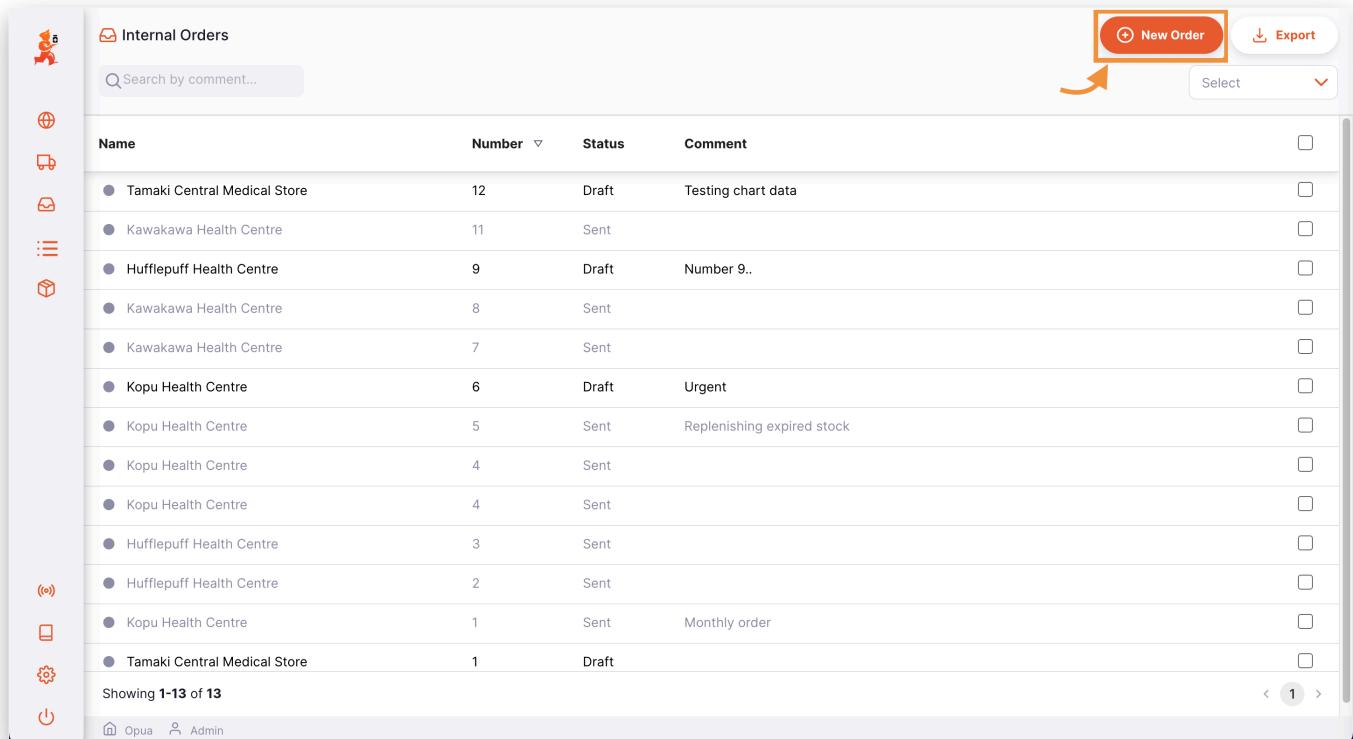
You can sort the list using the column headers:

1. Tap the column header of the column that you want to sort. The column is sorted in ascending order.
2. Tap the column header again and column will be sorted in the opposite order.

## Creating a new Internal Order

### Select a supplier

1. Click on the New Order button (top right corner):

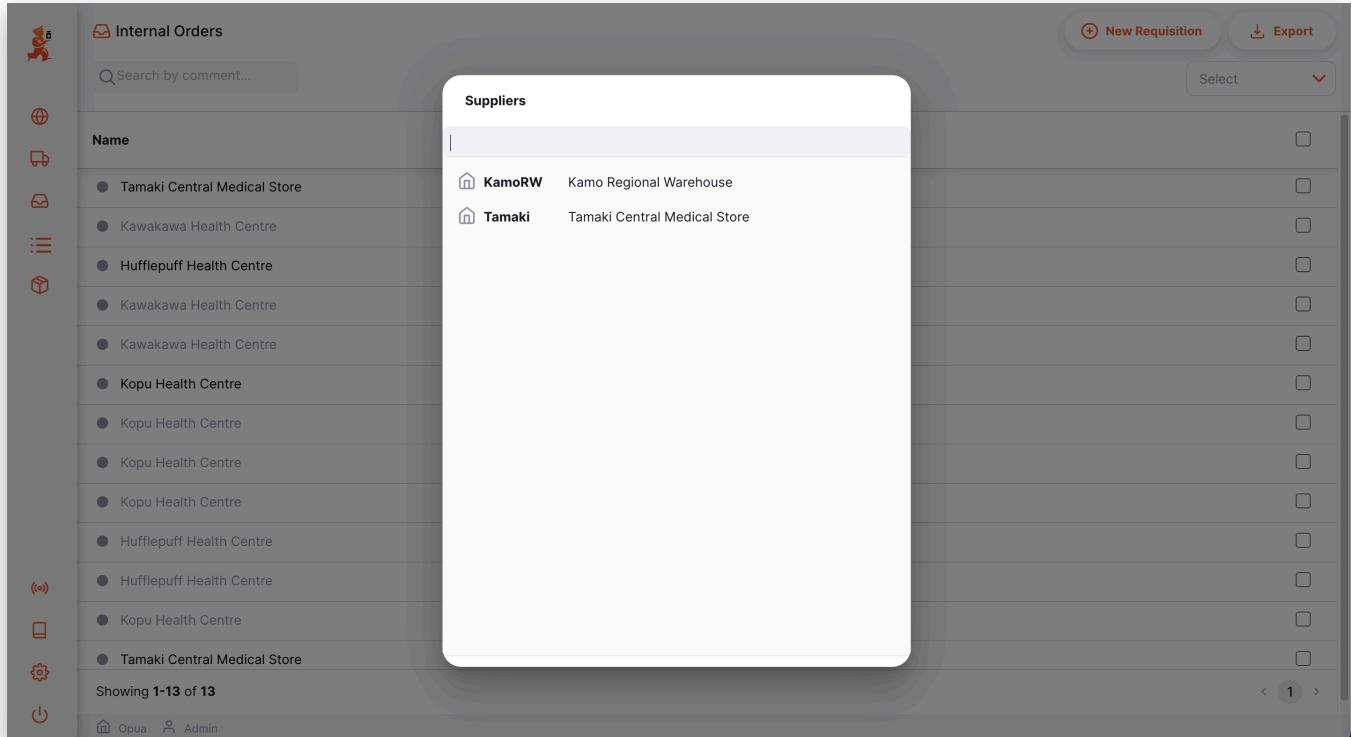


The screenshot shows a user interface for managing internal orders. On the left, there is a vertical sidebar with various icons. The main area is titled 'Internal Orders' and contains a search bar labeled 'Search by comment...'. A table lists 13 entries, each with a checkbox in the last column. The columns are labeled 'Name', 'Number', 'Status', and 'Comment'. The 'Number' column has a downward arrow indicating it is sortable. The 'Status' column also has a downward arrow. The 'Comment' column does not have a sorting arrow. The entries are as follows:

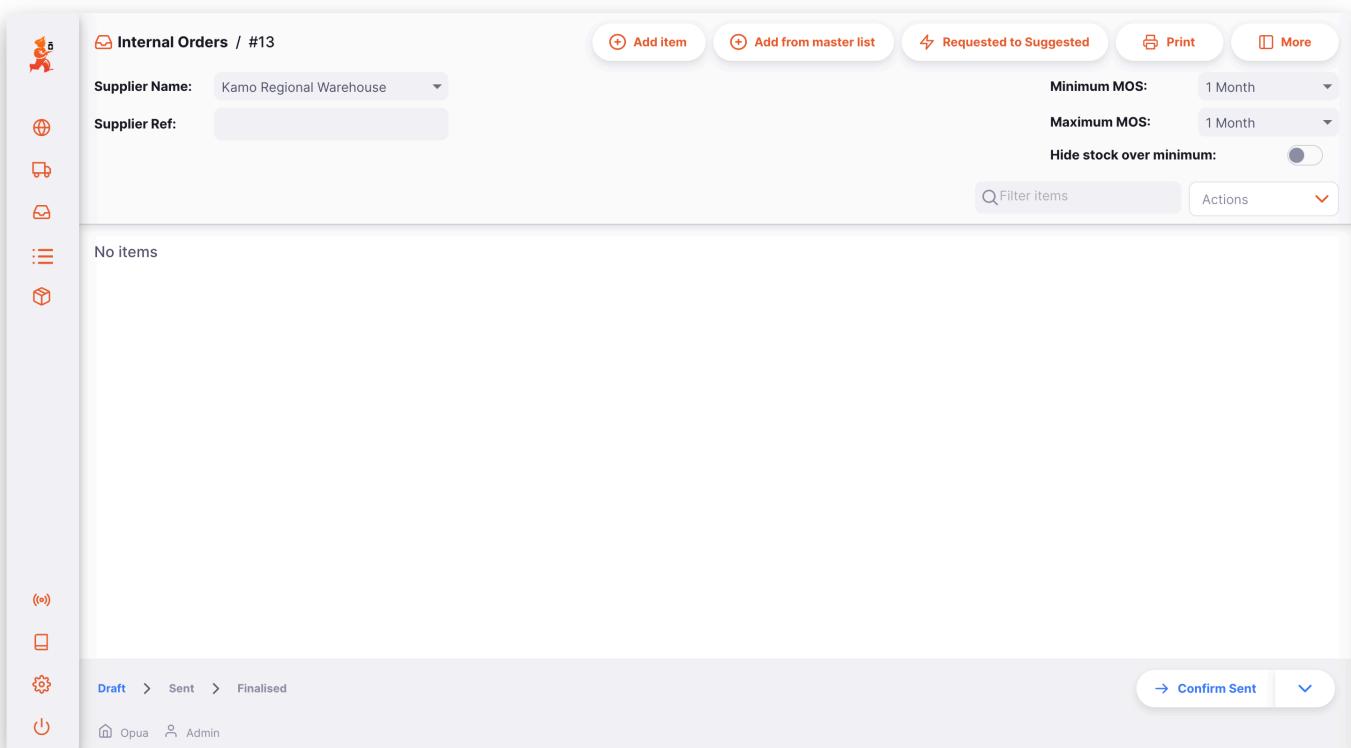
Name	Number	Status	Comment	
Tamaki Central Medical Store	12	Draft	Testing chart data	<input type="checkbox"/>
Kawakawa Health Centre	11	Sent		<input type="checkbox"/>
Hufflepuff Health Centre	9	Draft	Number 9..	<input type="checkbox"/>
Kawakawa Health Centre	8	Sent		<input type="checkbox"/>
Kawakawa Health Centre	7	Sent		<input type="checkbox"/>
Kopu Health Centre	6	Draft	Urgent	<input type="checkbox"/>
Kopu Health Centre	5	Sent	Replenishing expired stock	<input type="checkbox"/>
Kopu Health Centre	4	Sent		<input type="checkbox"/>
Kopu Health Centre	4	Sent		<input type="checkbox"/>
Hufflepuff Health Centre	3	Sent		<input type="checkbox"/>
Hufflepuff Health Centre	2	Sent		<input type="checkbox"/>
Kopu Health Centre	1	Sent	Monthly order	<input type="checkbox"/>
Tamaki Central Medical Store	1	Draft		<input type="checkbox"/>

At the bottom, it says 'Showing 1-13 of 13' and has navigation arrows. The top right corner features a red 'New Order' button with a plus sign and an orange 'Export' button with a downward arrow. A red arrow points from the text 'Click on the New Order button (top right corner)' to the 'New Order' button. Below the table, there are links for 'Opua' and 'Admin'.

2. A new window opens, inviting you to select a supplier:



3. Select a Supplier by pressing on its name. You will see a window like this:

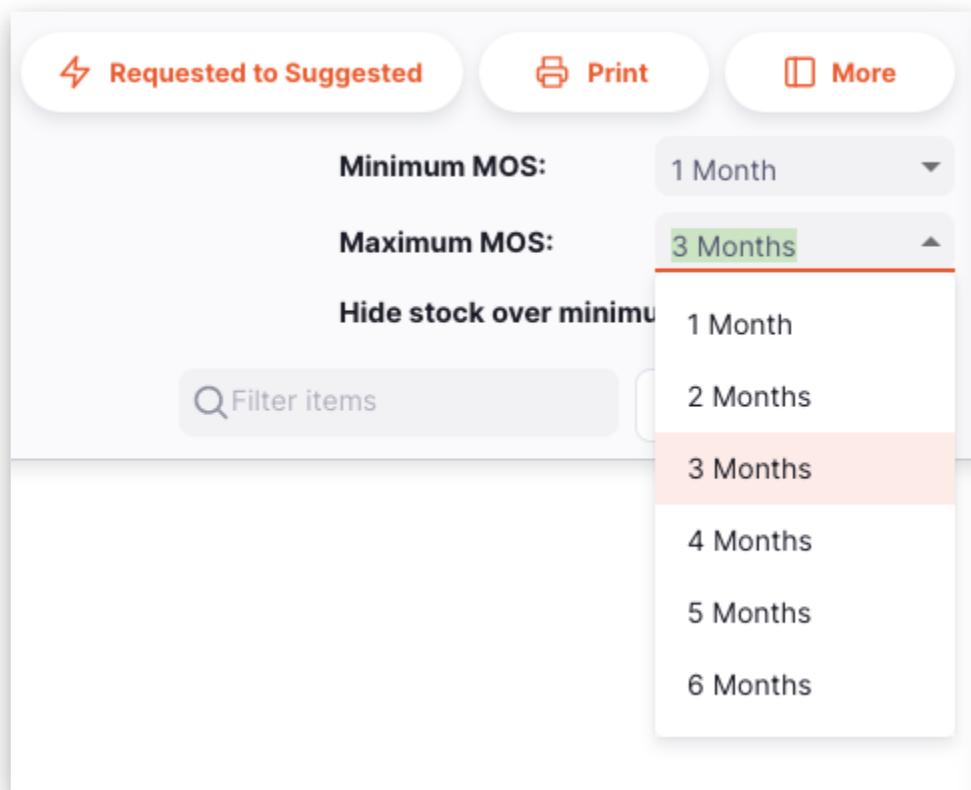


## Defining Maximum Month of Stock (Maximum MOS)

Defining the Maximum MOS (Month of Stock) is critical to the calculation of the **Suggested Quantity** and you can change it:

- There is an industry rule of thumb that the *Maximum MOS* should be set to 3 times the ordering cycle
- The default *Maximum MOS* is 3.0, which is based on a monthly ordering cycle
- If for example, the ordering cycle was every two months, then *Maximum MOS* should be set to  $3 \times 2 = 6.0$

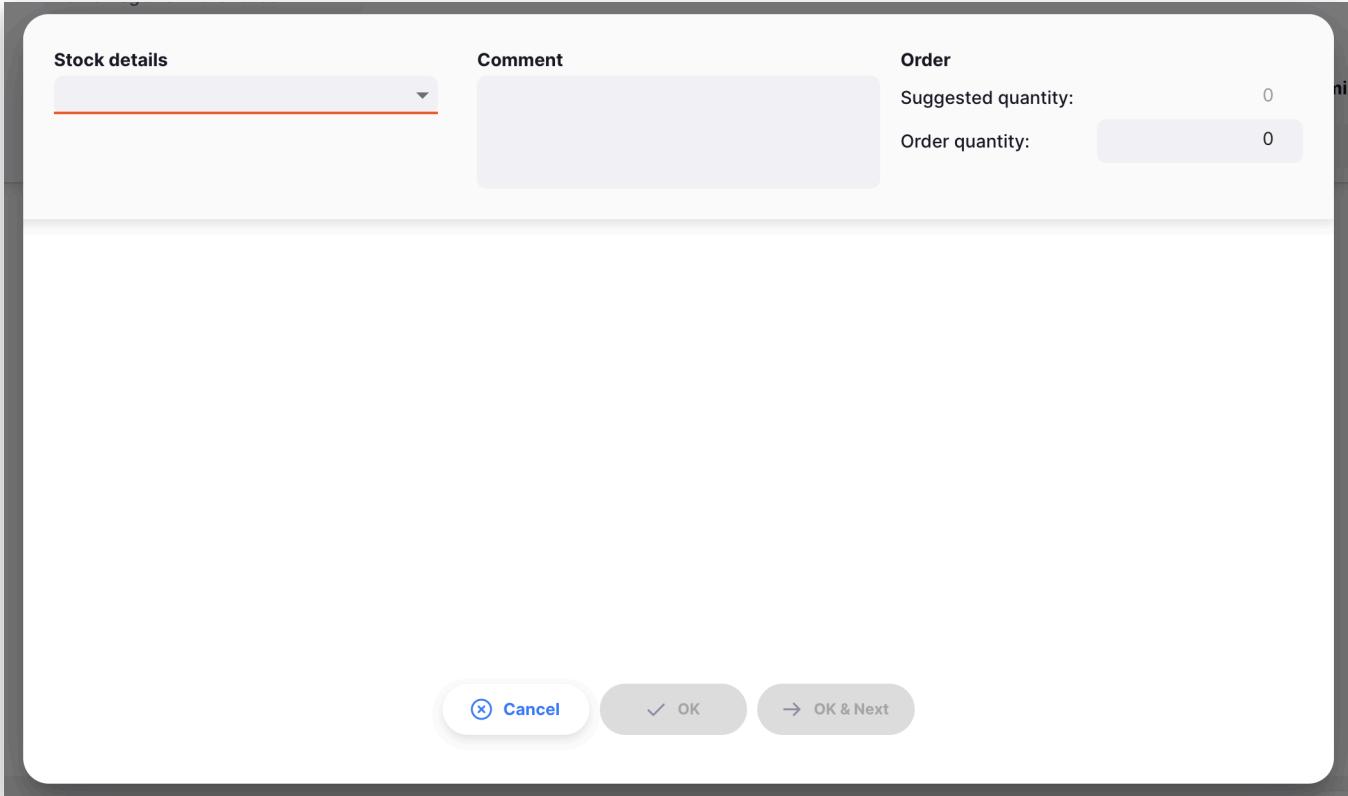
In below example, we are setting our Maximum MOS to 3 Months.



This can be done before or after adding items to your order.

## Adding a single item

Tap on **Add Item** to add a single item to your order. A new window opens:



First select the item you want to add to your order. Open the Stock details dropdown menu and select your item from the list. You can also type some or all of an item name (or code) to look for a specific item.

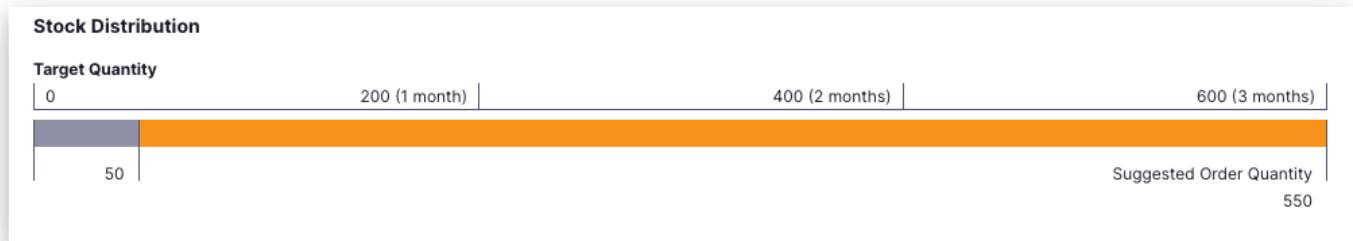
Once item is selected, you should see the following information on the window:

- **Item Code and Item Name**
- **Unit:** the default unit used for this item (eg. *Tablet, Vial*)
- **AMC:** Average Monthly Consumption. How much stock your store uses each month on average (based on a configurable number of months, default is set to 3 months)
- **Suggested Quantity:** how much stock mSupply suggests that your order to reach your stock target quantity
- **Order quantity:** the quantity of units that you request from your supplier

You should also see the following charts:

- **Stock distribution:** In this chart, you will see the following information:
  - The *Target Quantity* for the item. This is calculated as: Maximum MOS x AMC.
  - Your current *Stock on Hand* (in grey)
  - The *suggested quantity* calculated by mSupply

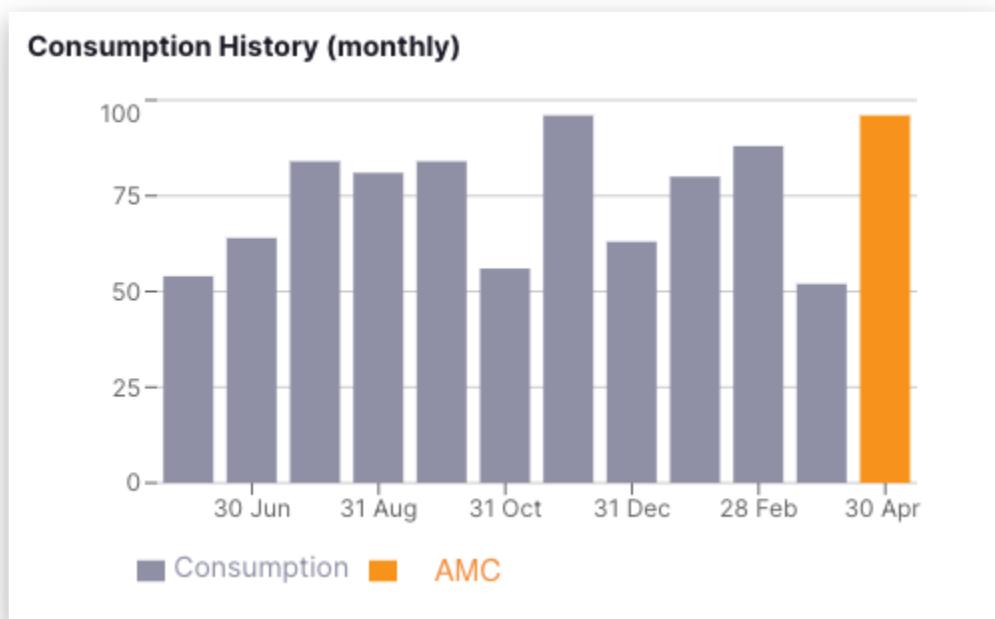
In below example, our target quantity is 600 units which is the equivalent of 3 months of stock ( $3 \times 200 = 600$  units). Our stock on hand (in grey) is 50 so in order to reach my target, mSupply suggests to order 550 units ( $600 - 50$ ).



In below example, the target quantity is 62 units. Since we already have 250 units in stock (in grey), the suggested quantity is zero.

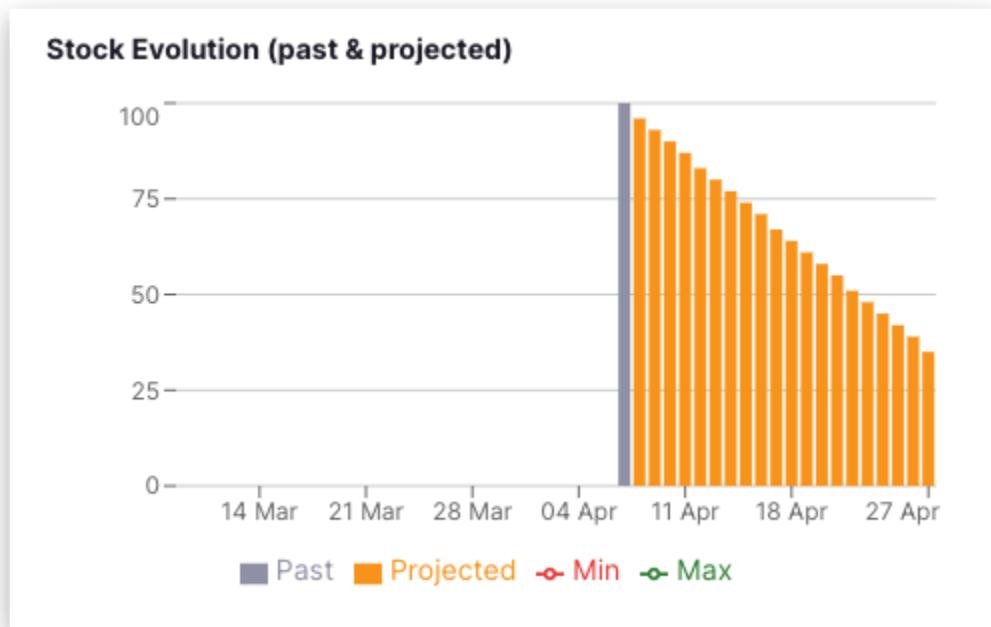


- **Consumption History (monthly):** this chart shows the monthly consumption up to 12 months in the past (in grey) and the current AMC (in orange):



- **Stock Evolution:** this chart shows you your stock level for the last 30 days and your

projected inventory for the next 30 days. The projected stock will be updated based on your inputs in the Order quantity field:



## Adding items using a master list

If your organisation is using Master Lists, you can add multiple items at once using your store's master lists. It is particularly useful when you have a lot of items in your order and you don't want to add them all one by one.

1. Tap on the Add from master list button
2. Select a master list
3. A dialog window opens asking you whether you want to add all of the items from this master list. Tap OK if you wish to proceed.

All the items of the master list are now listed in your order. If you had previously added single item, it will add items that are not already there.

Tap on an order line to change the **Order Quantity** or tap on the button Requested to Suggested button

Master Lists are defined and assigned to stores at the central server level. You can only see the master lists that are visible to your store.

If you don't find the master list you are looking for and if you want to create a new one, please contact your administrator.

You can create internal orders from multiple master lists by repeating above actions with another master list.

## Reading the Internal Order's list

When you add items (using a master list or not), the item is added to the order's table. The following information is provided for each order line:

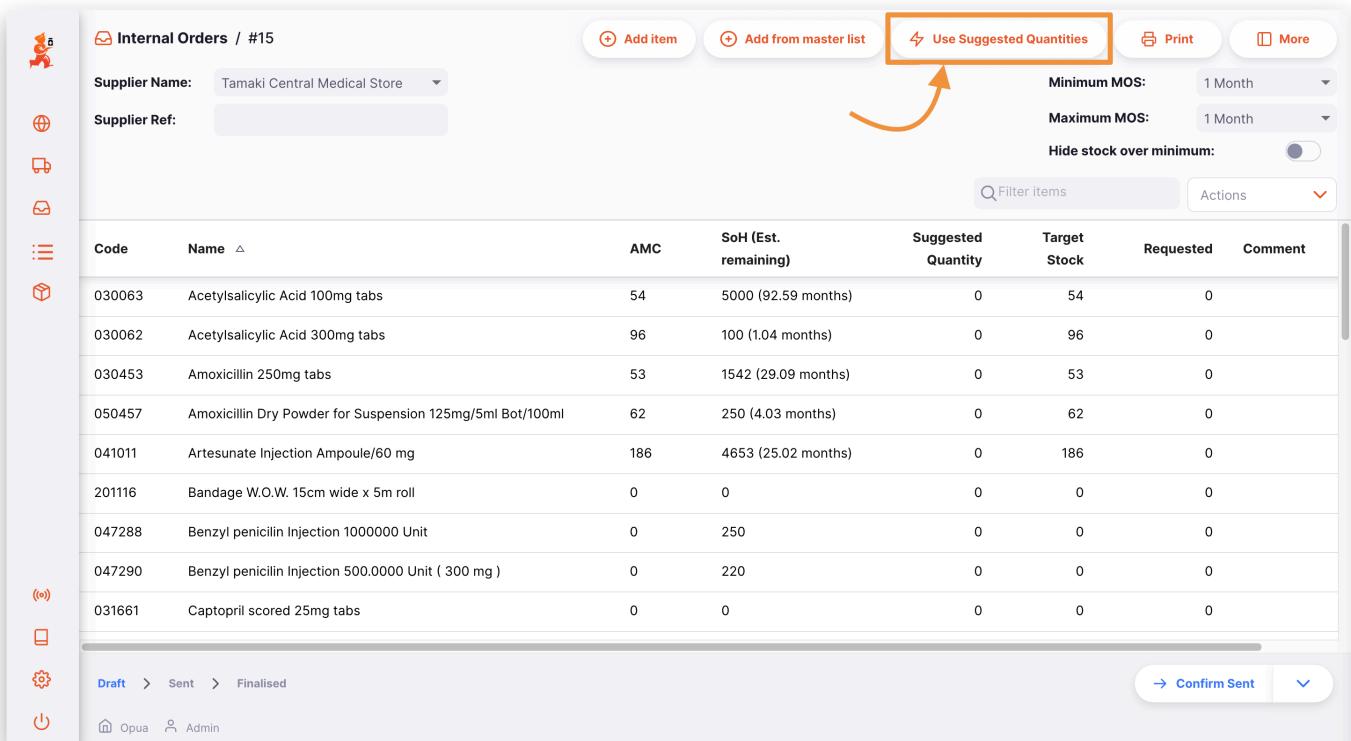
Status	Description
<b>Code</b>	Code of the item
<b>Name</b>	Name of the item
<b>SoH (Est. remaining)</b>	How much stock currently available in your store for this store
<b>AMC</b>	Average Monthly Consumption: how much stock your store uses each month on average (based on a configurable number of months, defaults to 3 months)
<b>Target</b>	This is the stock you are aiming for. Calculated as: AMC x Maximum MOS

Status	Description
<b>Stock</b>	
<b>Suggested</b>	How much stock mSupply suggests that your order. This is calculated as: AMC x Quantity
<b>Maximum MOS - SoH</b>	
<b>Requested</b>	This is set to zero by default. This is the quantity of units you are ordering from your supplier.
<b>Comment</b>	A comment for the order line. Comments will be visible to your supplier.

## Using Suggested Quantities

If you tap on the **Use Suggested Quantities** on the requisition header, mSupply will automatically copy the values in the **Suggested Quantity** column into the **Requested Quantity** column.

You can always manually edit the order quantity for each by tapping on an order line.



The screenshot shows the Internal Orders screen with the following details:

- Header:** Internal Orders / #15, Supplier Name: Tamaki Central Medical Store, Supplier Ref: [redacted].
- Buttons:** Add item, Add from master list, Use Suggested Quantities (highlighted with an orange box and an arrow), Print, More.
- Filters:** Minimum MOS: 1 Month, Maximum MOS: 1 Month, Hide stock over minimum: [switch off].
- Table Headers:** Code, Name, AMC, SoH (Est. remaining), Suggested Quantity, Target Stock, Requested, Comment.
- Table Data:**

Code	Name	AMC	SoH (Est. remaining)	Suggested Quantity	Target Stock	Requested	Comment
030063	Acetylsalicylic Acid 100mg tabs	54	5000 (92.59 months)	0	54	0	
030062	Acetylsalicylic Acid 300mg tabs	96	100 (1.04 months)	0	96	0	
030453	Amoxicillin 250mg tabs	53	1542 (29.09 months)	0	53	0	
050457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/100ml	62	250 (4.03 months)	0	62	0	
041011	Artesunate Injection Ampoule/60 mg	186	4653 (25.02 months)	0	186	0	
201116	Bandage W.O.W. 15cm wide x 5m roll	0	0	0	0	0	
047288	Benzyl penicillin Injection 1000000 Unit	0	250	0	0	0	
047290	Benzyl penicillin Injection 500.0000 Unit (300 mg)	0	220	0	0	0	
031661	Captopril scored 25mg tabs	0	0	0	0	0	
- Bottom Navigation:** Draft > Sent > Finalised, Confirm Sent, Admin.

## Printing an Internal Order

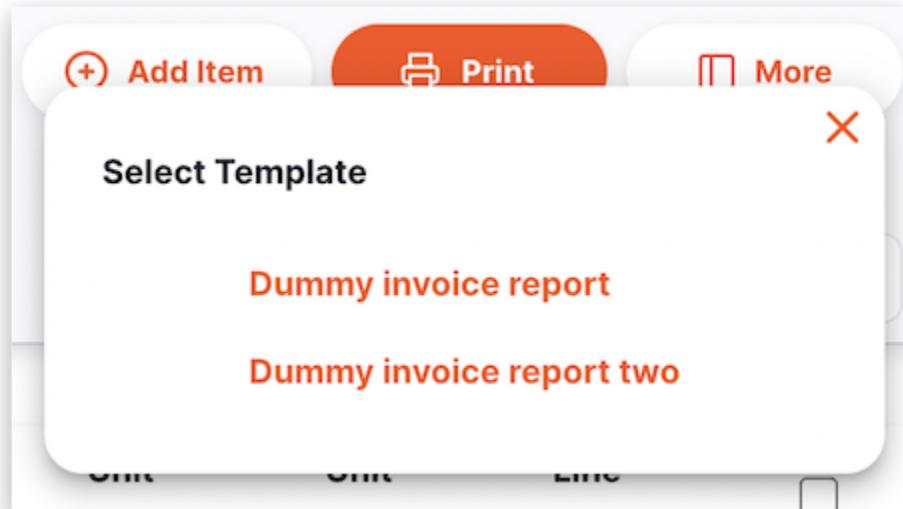
When viewing a specific Internal Order, simply click the **Print** button which is on the top right of the page. When printing, a PDF file is generated for you, which will then open in a new browser tab. This can then be printed using your browser by clicking print or using

control+P (if using windows) or cmd+P keys on your keyboard (if using a mac).



This will either

- Show a menu of possible reports for you to select from before creating a PDF. This will happen if there are more than one report defined for the Requisition report type.
- Create a PDF immediately, if there is only one report to select from



## Sending an Internal Order

To send the order to your supplier:

1. Tap on the Confirm Sent button (bottom right corner)
2. A dialog window opens asking you whether you are sure to want to send the order.  
Tap on OK to proceed
3. Status of your order is now SENT and the order is no longer editable

Ensure that your order is correct before sending it to your supplier. Once sent, no further changes can be made to finalised orders.

# Suppliers

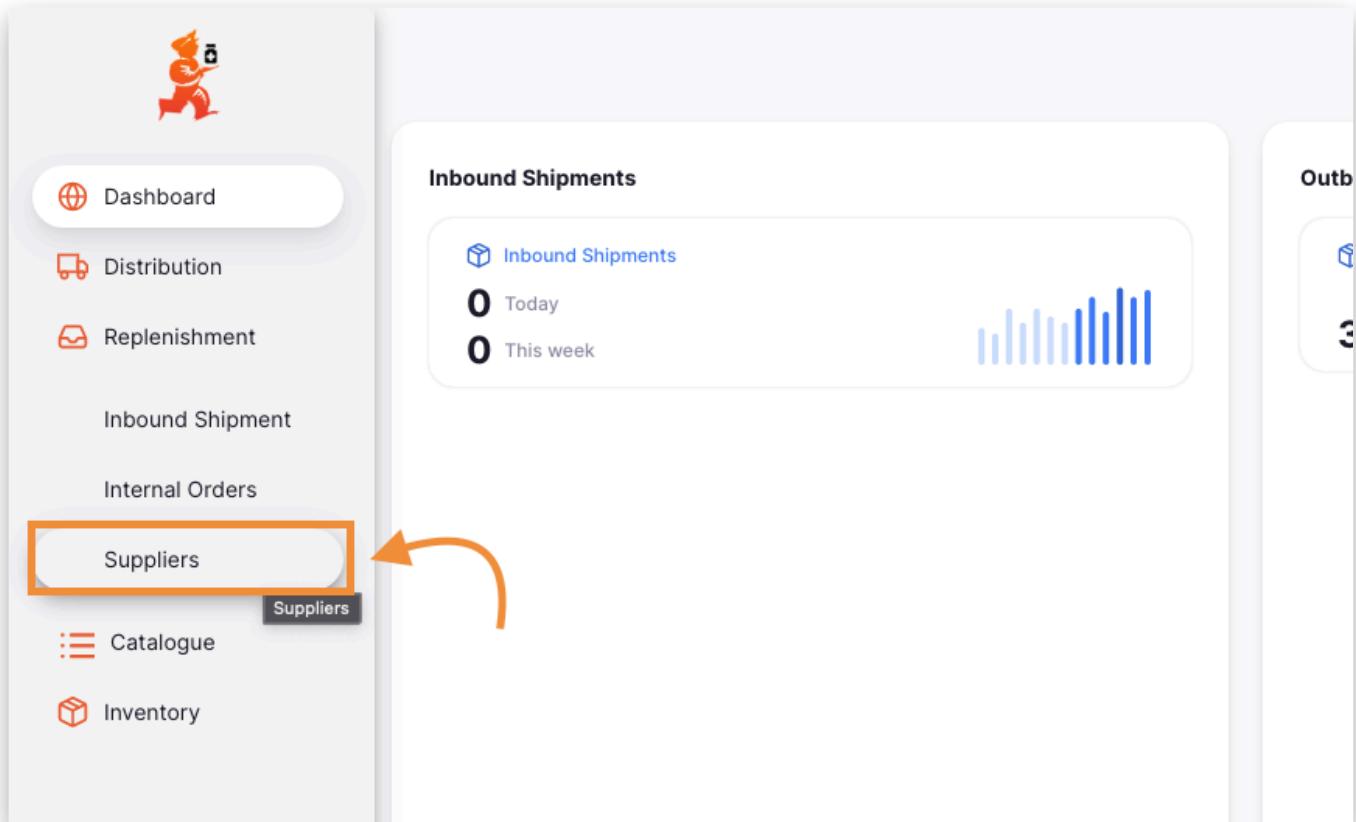
View and manage your suppliers

In mSupply, a supplier is an entity that is sending stock to your store.

At the moment, you are only able to view your supplier and their details. In the future, you will be able to create and edit your customers (provided you have the authorisation to do so!).

## Viewing Suppliers

To view the suppliers of your store, go to Replenishment > Supplier in the navigation panel:



A list of your store's suppliers appears:

The screenshot shows a mobile application interface for managing suppliers. On the left is a vertical sidebar with orange icons: a person, a globe, a truck, an envelope, a list, and a box. The main content area has a header "Suppliers" with a back arrow. A table lists two suppliers: "Kamo Regional Warehouse" with code "KamoRW" and "Tamaki Central Medical Store" with code "Tamaki". Below the table, it says "Showing 1-2 of 2". At the bottom of the screen are navigation icons for home, back, forward, and search, along with the text "Opua Admin".

Name	Code
Kamo Regional Warehouse	KamoRW
Tamaki Central Medical Store	Tamaki

## Viewing Suppliers Details

To see the details of one supplier, simply tap on its name:

V

### Kamo Regional Warehouse

<b>Address:</b>	<b>Date Created:</b> 28/02/2010
<b>Code:</b> KamoRW	<b>Manufacturer:</b> <input type="checkbox"/>
<b>Charge Code:</b> KamoRW	<b>Donor:</b> <input type="checkbox"/>
<b>Country:</b>	<b>On Hold:</b> <input type="checkbox"/>
<b>Comment:</b>	
<b>Phone:</b>	
<b>Website:</b>	

**✓ OK**

- **Address:** Address of the supplier
- **Code:** This is the code assigned to this supplier in mSupply
- **Charge Code:** Generally the same value as code, however it may be useful when working with your accounting system to have a different code for this supplier
- **Country:** country of the supplier
- **Comment:** Comment about this supplier
- **Phone:** Phone number of the supplier
- **Website:** Web site or email address of the supplier
- **Date Created:** Date when supplier was created in mSupply
- **Manufacturer:** If this is checked, the supplier is also a manufacturer
- **Donor:** If this is checked, supplier is also a donor
- **On Hold:** If this is checked, you won't be able to create new transactions for this supplier

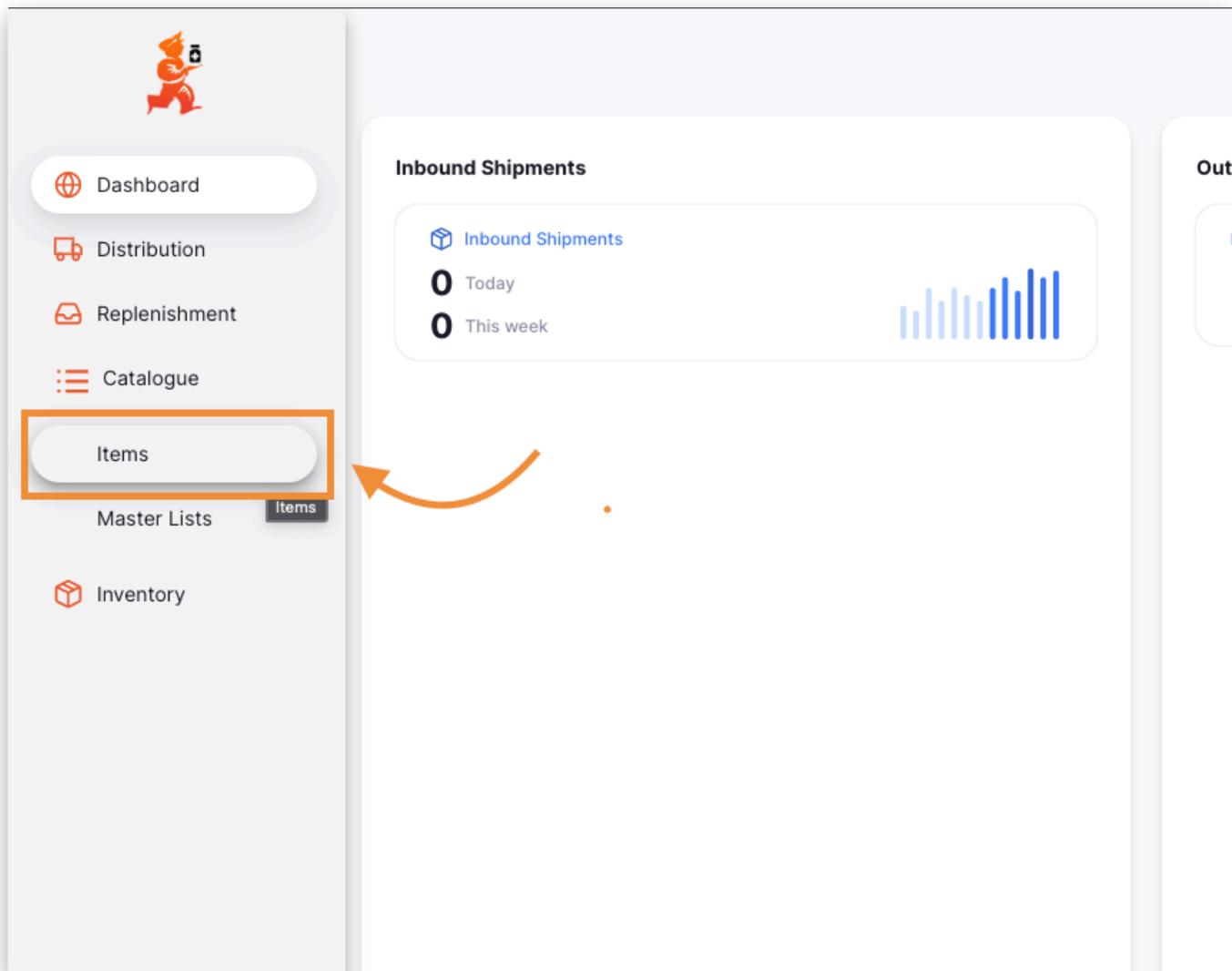
# Items

Managing your catalogue

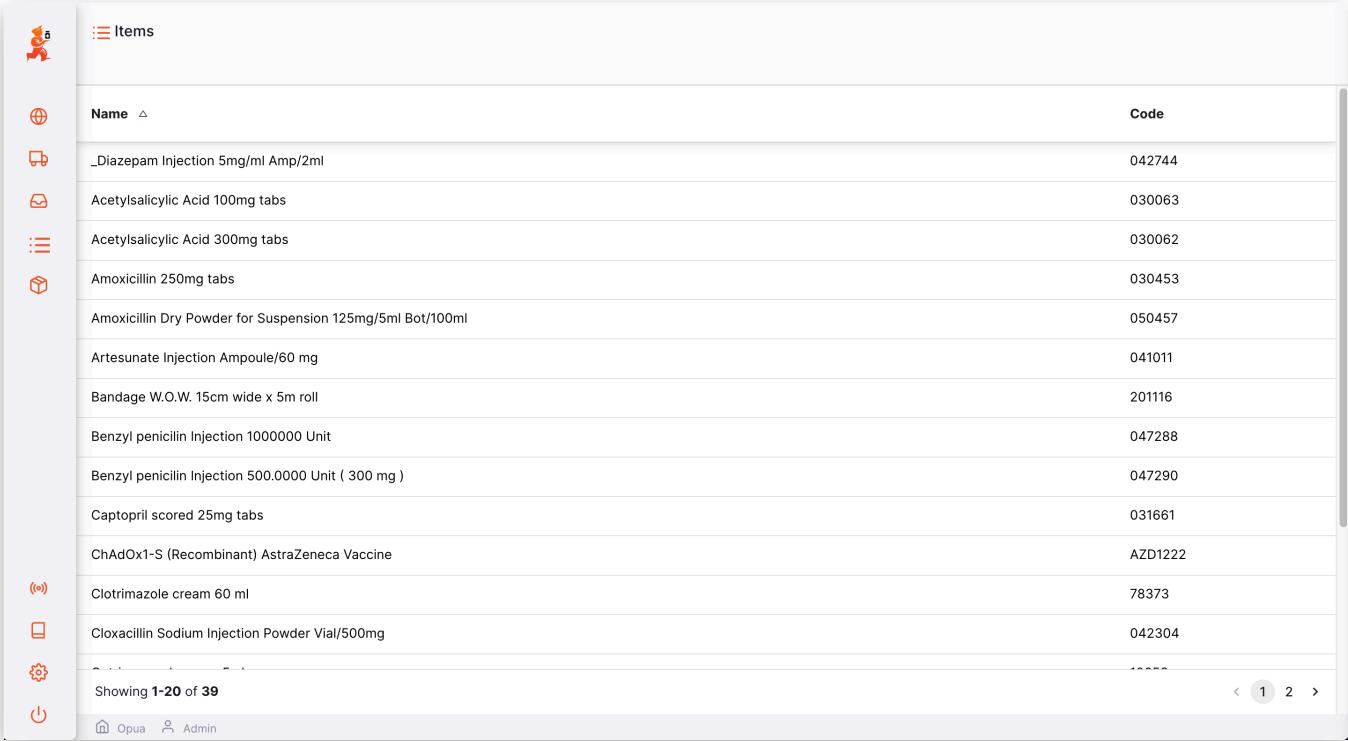
An item in open mSupply is usually a product that you purchase from a supplier, hold in stock and supply to a customer. In the **Items** menu, you can see all the items that are currently visible in your store.

## Viewing items list

In the navigation panel, tap on Catalogue > Items to show the items list:



You can see all the items which are available for use by your store:



The screenshot shows a list of medical items in a table format. The columns are 'Name' and 'Code'. The items listed include various medications and supplies, such as Diazepam Injection, Acetylsalicylic Acid, and different types of Amoxicillin. The interface includes a sidebar with icons for navigation and a footer with user information.

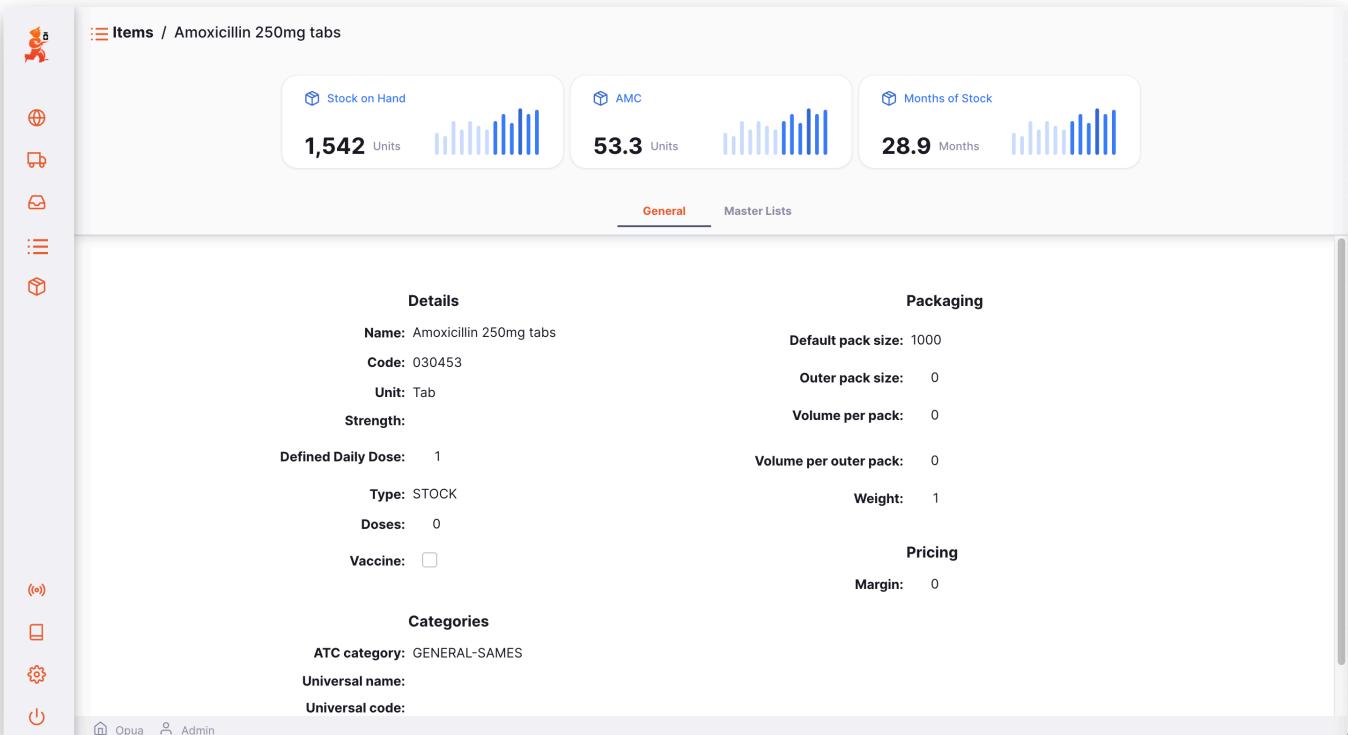
Name	Code
Diazepam Injection 5mg/ml Amp/2ml	042744
Acetylsalicylic Acid 100mg tabs	030063
Acetylsalicylic Acid 300mg tabs	030062
Amoxicillin 250mg tabs	030453
Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/100ml	050457
Artesunate Injection Ampoule/60 mg	041011
Bandage W.O.W. 15cm wide x 5m roll	201116
Benzyl penicillin Injection 1000000 Unit	047288
Benzyl penicillin Injection 500.0000 Unit ( 300 mg )	047290
Captopril scored 25mg tabs	031661
ChAdOx1-S (Recombinant) AstraZeneca Vaccine	AZD1222
Clotrimazole cream 60 ml	78373
Cloxacillin Sodium Injection Powder Vial/500mg	042304

Showing 1-20 of 39

Opua Admin

## Viewing an item's details

To view the details of an item, simply tap on one. A new window opens:



The screenshot shows the detailed information for the item 'Amoxicillin 250mg tabs'. It includes three summary metrics: Stock on Hand (1,542 Units), AMC (53.3 Units), and Months of Stock (28.9 Months). The 'General' tab is selected, showing details like Name, Code, Unit, Strength, and defined daily dose. The 'Packaging' tab shows default pack size (1000), outer pack size (0), volume per pack (0), and weight (1). The 'Pricing' tab shows margin (0). The 'Categories' section lists ATC category (GENERAL-SAMES), universal name, and universal code. The interface includes a sidebar with icons for navigation and a footer with user information.

Stock on Hand: 1,542 Units

AMC: 53.3 Units

Months of Stock: 28.9 Months

General

Details

Name: Amoxicillin 250mg tabs  
Code: 030453  
Unit: Tab  
Strength:  
Defined Daily Dose: 1  
Type: STOCK  
Doses: 0  
Vaccine:

Packaging

Default pack size: 1000  
Outer pack size: 0  
Volume per pack: 0  
Weight: 1

Pricing

Margin: 0

Categories

ATC category: GENERAL-SAMES  
Universal name:  
Universal code:

Opua Admin

On top of the screen, you can see the following information:

- **Stock on Hand:** How much stock currently available in your store for this store
- **AMC:** Average Monthly Consumption. This is how much stock your store uses each month on average (based on a configurable number of months, defaults to 3 months).
- **Months of Stock:** Number of months of consumption left with current stock. This is calculated as: Stock on Hand / AMC.

In below example, we have 1542 units of Amoxicillin available in our store. The average consumption is 53.3 units per month which means that there is the equivalent of 28.9 months of stock in the inventory.



In the bottom part, item details are divided into several sections:

## Details

- **Name:** This is the name by which mSupply will refer to the item
- **Code:** This should be unique for each item and is a helpful shorthand for referring to items
- **Unit:** The unit you use for this item. It is useful to distinguish items you issue by pack (eg. eye drops) from items you issue by volume (eg. oral liquids)
- **Strength:** For a medicine, the concentration of its active ingredients (eg. for Amoxicillin 250mg, the strength is 250mg)
- **Defined Daily Dose:** The assumed average maintenance dose per day for a medicine used for its main indication in adults
- **Doses:** For vaccines, the number of dose per vial
- **Vaccine** (check box): If this is checked, this item is a vaccine and a number of dose can be assigned

## Categories

- **ATC Category:** ATC stands for Anatomical, Therapeutic, Chemical and is a method of classifying entities, and identifying them by category

- **Universal Name:** if the item is linked to the [universal drug code database](#), this shows the universal, or generic name for the given item
- **Universal Code:** similarly, the code allocated to the universal drug code item

## Packaging

- **Default pack size:** This is the default pack size that will be assigned to incoming stock as it is received
- **Outer pack size:** The number of units in a carton (outer pack). Not the number of preferred pack size packs in a carton (outer pack).
- **Volume per pack:** The default volume per preferred pack size pack. This is the volume that will be used by default when receiving goods. We recommend you divide a carton volume by the number of preferred pack size packs in a carton to get this figure. Open mSupply always stores volumes in m<sup>3</sup> (cubic metres), but you can enter a volume as millilitres (ml) or litres (l) by entering the appropriate abbreviation after the number representing the volume. e.g. enter “0.5l” to enter a volume of 0.5 litres (= 0.0005m<sup>3</sup>).
- **Volume per outer pack:** The default volume of an Outer pack size pack of this item
- **Weight:** The weight of a preferred pack size pack in kg

## Pricing

- **Margin:** This is the default margin that will be applied to this item on Inbound Shipments to calculate the selling price

# Master Lists

Master lists are standard lists of items that can only be defined at the central server level.

## Viewing Master Lists

Go to Catalogue > Master Lists in the navigation panel:

The screenshot shows the application's interface. On the left is a navigation panel with a logo at the top, followed by several items under 'Items': Dashboard, Distribution, Replenishment, Catalogue, and a section labeled 'Items' containing Master Lists and Inventory. The 'Master Lists' item is highlighted with an orange rounded rectangle and has an orange arrow pointing from it to the main content area. The main content area is titled 'Master Lists' and features a search bar labeled 'Search by name'. Below the search bar is a table with two columns: 'Code' and 'Name'. The table contains two rows: 'All items: General Warehouse' and 'Program A'. At the bottom of the table, it says 'Showing 1-2 of 2'.

You will see a window like this:

**Master Lists**

All items: General Warehouse

Code	Name	Description
	All items: General Warehouse	
	Program A	

Showing 1-2 of 2

Opua Admin

To view all the items of a master list, simply tap on one:

**Master Lists / C86AC47582FE4200BCB9B89A29FF59C4**

Name: All items: General Warehouse

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
041011	Artesunate Injection Ampoule/60 mg	Vial
201116	Bandage W.O.W. 15cm wide x 5m roll	Roll
047288	Benzyl penicillin Injection 1000000 Unit	Vial
047290	Benzyl penicillin Injection 500.0000 Unit ( 300 mg )	Vial
031661	Captopril scored 25mg tabs	Tablet
AZD1222	ChAdOx1-S (Recombinant) AstraZeneca Vaccine	Vial
78373	Clotrimazole cream 60 ml	
042304	Cloxacillin Sodium Injection Powder Vial/500mg	Vial
12653	Cotrimoxazole syrup 5ml	
12763	Glipizide 5 mg tablets	
850804	Oral Rehydration Solution Reso Mat 42g sachet for 1 litre/ CAR-100	Sachet
037020	Paracetamol 500mg tabs	Tablet
037021	Paracetamol Suppository 120mg	Each
047283	Penicillin Benzyl Penicillin PFI 1 MU=600 mg	Vial

Opua Admin

# Locations

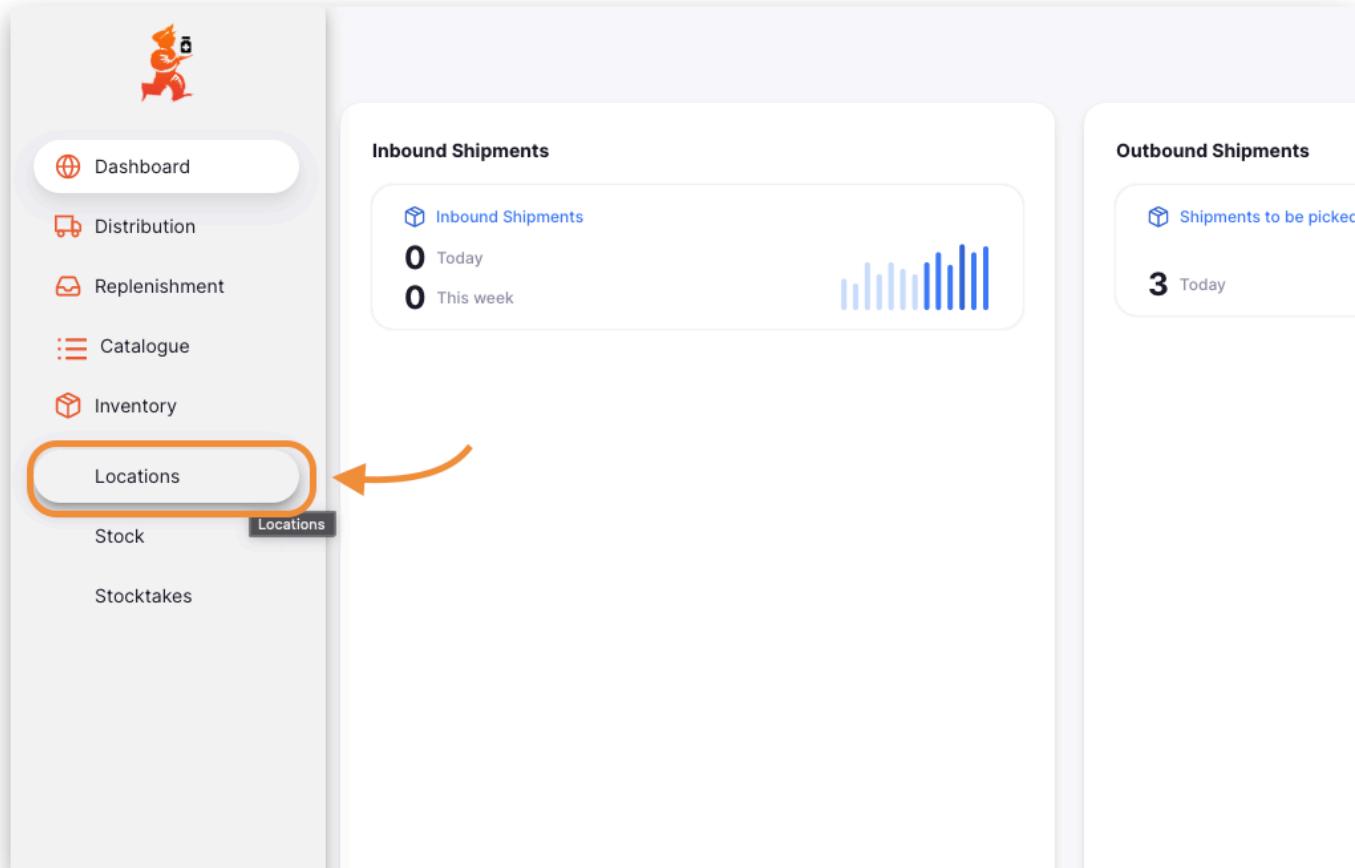
View and manage your storage locations

Keeping track of where stock is in your store is an important part of good warehouse practice. You don't want to have to go hunting through your whole store for stock, wasting time and energy when mSupply can tell you exactly where it is!

Locations in mSupply are the places you store stock.

## Viewing your store's locations

To view the storage locations of your store, go to **Inventory > Locations** in the navigation panel:



You will see a list of your storage locations:

	Code	Name	<input type="checkbox"/>
	A1	A1	<input type="checkbox"/>
	A2	A2	<input type="checkbox"/>
	A3	A3	<input type="checkbox"/>
	B1	B1	<input type="checkbox"/>
	B2	B2	<input type="checkbox"/>
	B3	B3	<input type="checkbox"/>
	C1	C1	<input type="checkbox"/>
	C2	C2	<input type="checkbox"/>
	CL1	Cool Room 1	<input type="checkbox"/>
	CL2	Cool Room 2	<input type="checkbox"/>
	RED	Red.01	<input type="checkbox"/>
	Red.02	Red.02	<input type="checkbox"/>
Showing 1-12 of 12			< 1 >

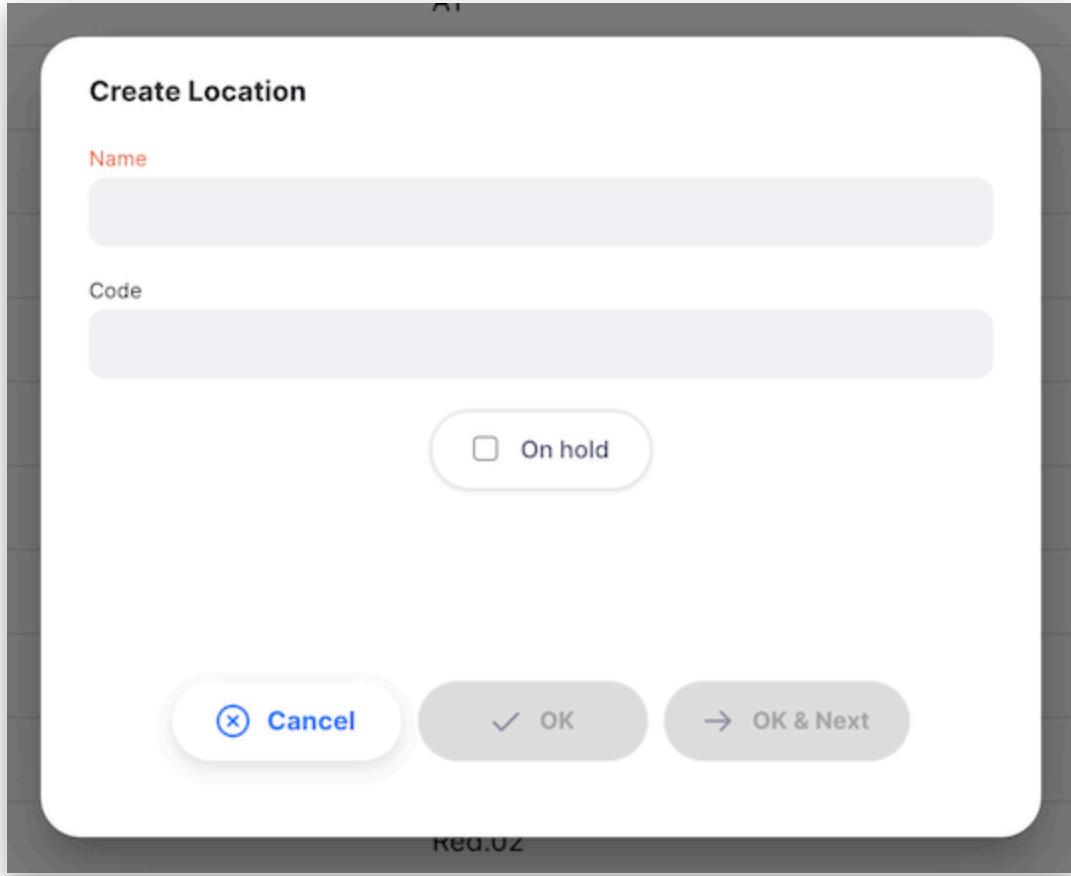
Opua Admin

## Creating a new location

To create a new location, tap on the New Location button in the top right corner of the screen:

Location: new location button

A window like this opens:



1. **Name:** Enter the name of the new location
2. **Code:** Enter a code for the new location
3. **On Hold** (checkbox): If you check this box, then goods in this location cannot be selected for issue to customers. Goods can be moved in to, and out, of the location but they cannot be issued from that location.

Putting a location on hold can be useful if:

- The stock needs to be kept from being issued until some inspection / approval (e.g. quarantine or under bond)
- The stock is a bulk quantity with the same expiry date as another stock line in another location from which you want stock issued. You can use this feature to force mSupply to always suggest issuing stock of this item from the 'issue' location rather than this 'bulk' location. When you have finished issuing stock from the 'issue' location, and you want to issue the stock that is in the 'bulk' location, you will need to either take the 'bulk' location off hold, or, move all, or some of it (split), the stock from the 'bulk' location.

## **Editing a new location**

To edit a location, simply tap on one in the location list.

## **Deleting a location**

To delete a location:

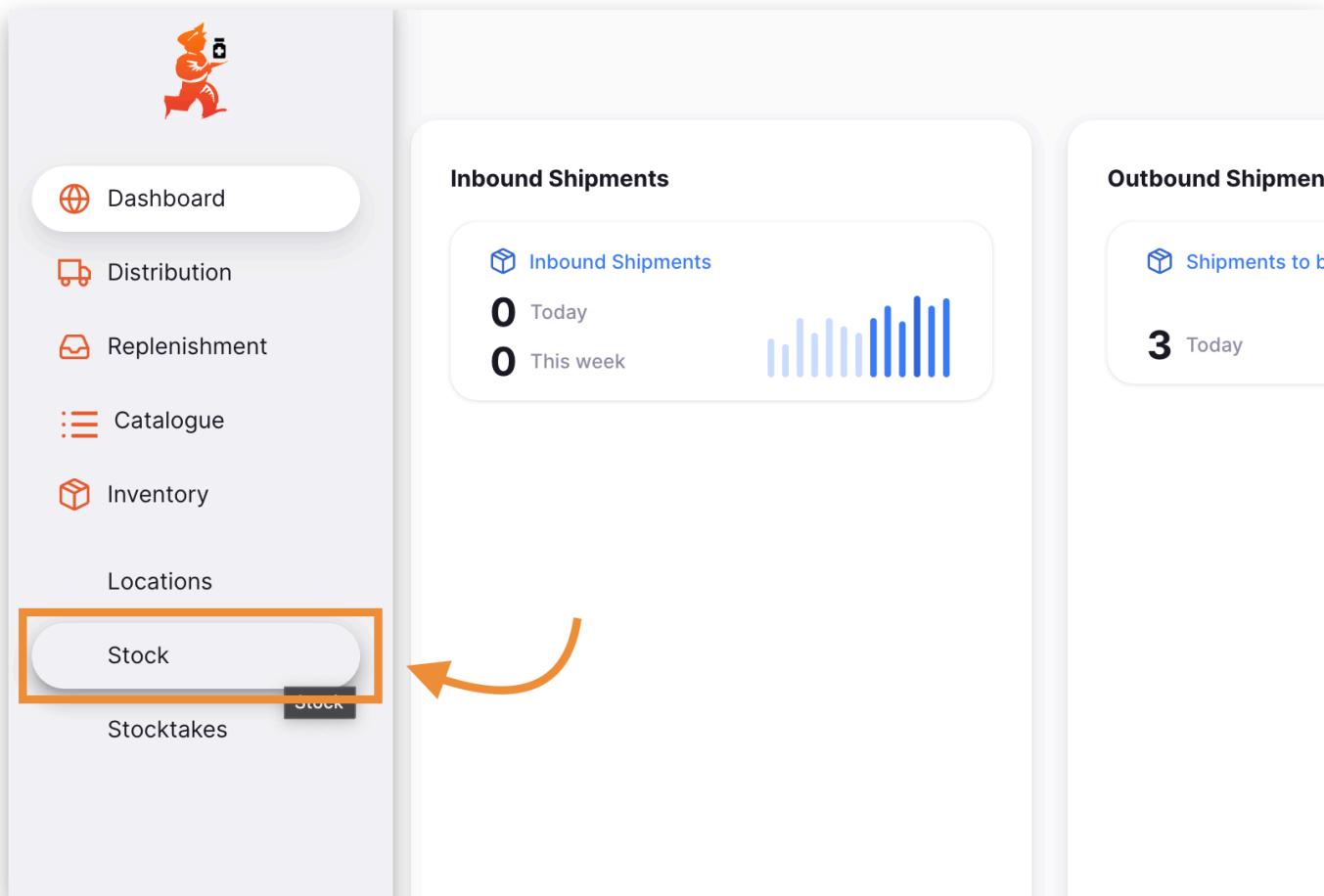
1. Check the box of the location that you want to delete in the location list
2. Click on the Select dropdown menu and select Delete selected line

# Stock

One of the most important - but easiest - tasks in mSupply is to check how much stock you have on hand. When you create an Outbound Shipment and add an item, mSupply will tell you if you have enough stock. But at many other times, you might want to quickly check, and it is very simple to do so.

## Viewing stock

In the navigation panel, Go to **Inventory** and tap on the **Stock** submenu:



A detailed list of your inventory appears:

The screenshot shows the mSupply Stock screen. On the left, there is a vertical sidebar with orange icons for various functions: Home, Stock, Reports, Purchase, Sales, Locations, Items, Transfers, and Settings. The main area is titled "Stock" and contains a search bar with placeholder text "Enter item code or name". Below the search bar is a table with the following columns: Code, Name, Batch, Expiry, Location, Unit, Pack Size, and Pack Qty. The table lists 20 items, mostly Amoxicillin 250mg tabs, with various batch numbers, expiry dates, locations, units, pack sizes, and pack quantities. At the bottom of the table, it says "Showing 1-20 of 20". Below the table, there are links for "Opua" and "Admin", and a page navigation bar with a back arrow, a central number "1", and a forward arrow.

Code	Name	Batch	Expiry	Location	Unit	Pack Size	Pack Qty
030063	Acetylsalicylic Acid 100mg tabs	B88001I	02/2027		Tablet	100	50
030062	Acetylsalicylic Acid 300mg tabs	B898	11/2026		Tablet	10	10
030453	Amoxicillin 250mg tabs	A99080K	05/2024	A1	Tab	1	25
030453	Amoxicillin 250mg tabs	A99080L	05/2024	A1	Tab	12	25
030453	Amoxicillin 250mg tabs	A99080M	05/2024	A1	Tab	1	80
030453	Amoxicillin 250mg tabs	ABC123	05/2025		Tab	1	25
030453	Amoxicillin 250mg tabs	ABC123	05/2025		Tab	1	25
030453	Amoxicillin 250mg tabs	CBA321	05/2025		Tab	5	5
030453	Amoxicillin 250mg tabs	CBA321	05/2025		Tab	5	5
030453	Amoxicillin 250mg tabs	A99080K	05/2020		Tab	1	1000
030453	Amoxicillin 250mg tabs	UYDD56787	05/2025		Tab	10	1
030453	Amoxicillin 250mg tabs	BTSU0039	06/2027		Tab	10	10
030453	Amoxicillin 250mg tabs	BTSU0038	05/2026		Tab	1	100

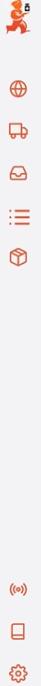
The list is divided into 8 columns:

- **Code:** This is the code assigned to this item in mSupply
- **Name:** This is the name by which mSupply will refer to the item
- **Batch:** Batch number of the stock line
- **Expiry:** Expiry date of the batch
- **Location:** Where the item is being stored in your facility
- **Unit:** The unit you use for this item
- **Pack Size:** Number of units per pack
- **Pack Qty:** Number of packs available in your store

## Looking for a specific item

You can filter the list by item name or code. This can be useful if you're looking for one particular item.

Type as much of an item name or code in the Enter item code or name field:



**Stock**

Enter item code or name

Code	Name	Batch	Expiry	Location	Unit	Pack Size	Pack Qty
030063	Acetylsalicylic Acid 100mg tabs	B88001I	02/2027		Tablet	100	50
030062	Acetylsalicylic Acid 300mg tabs	B898	11/2026		Tablet	10	10
030453	Amoxicillin 250mg tabs	A99080K	05/2024	A1	Tab	1	25
030453	Amoxicillin 250mg tabs	A99080L	05/2024	A1	Tab	12	25
030453	Amoxicillin 250mg tabs	A99080M	05/2024	A1	Tab	1	80
030453	Amoxicillin 250mg tabs	ABC123	05/2025		Tab	1	25
030453	Amoxicillin 250mg tabs	ABC123	05/2025		Tab	1	25
030453	Amoxicillin 250mg tabs	CBA321	05/2025		Tab	5	5
030453	Amoxicillin 250mg tabs	CBA321	05/2025		Tab	5	5
030453	Amoxicillin 250mg tabs	A99080K	05/2020		Tab	1	1000
030453	Amoxicillin 250mg tabs	UYDD56787	05/2025		Tab	10	1
030453	Amoxicillin 250mg tabs	BTSU0039	06/2027		Tab	10	10
030453	Amoxicillin 250mg tabs	BTSU0038	05/2026		Tab	1	100
050457	Amoxicillin Drv Powder for Suspension 125mg/5ml Bott/100ml	R0900	08/2030		Bottle	10	25

Showing 1-20 of 20

< 1 >

# Stocktakes

Counting and adjusting stock

mSupply will automatically keep track of your stock levels for you, as you receive and distribute it. But sometimes data gets entered incorrectly or stock goes out without anyone making an entry in the system.

Of course, we try not to let that happen but, if it does happen, we can make corrections. The easiest way to correct mistakes is to do a **Stocktake**.

In mSupply, you can easily do a stocktake for:

- A full inventory
- A limited range of items
- A single item

## Viewing Stocktakes

To view your stocktakes, go to [Inventory](#) and then [Stocktakes](#) in the navigation panel:

The screenshot shows the Opua software interface. On the left sidebar, there are several icons and labels: Dashboard (globe), Distribution (truck), Replenishment (box), Catalogue (list), Inventory (cube), Locations, Stock, and Stocktakes. The Stocktakes button is highlighted with an orange box and an arrow points from it to the Stocktakes section on the right. The right side of the screen is divided into three main sections: Inbound Shipments, Outbound Shipments, and a central area for Stocktakes. The Inbound Shipments section shows 0 Today and 0 This week with a bar chart. The Outbound Shipments section shows 3 Today. The central Stocktakes section has a header 'Stocktakes' with a search bar and a 'New Stocktake' button. Below this is a table listing five stocktake entries with columns for Number, Status, Description, Comment, Date, and a checkbox. The table shows entries for March Stocktake, the wire, Adding A Items, and others.

This brings up a list of all your stocktakes:

Stocktakes					
	Number	Status	Description	Comment	Date
	2	Finalised			
	4	Finalised			
	7	New	March Stocktake		07/03/2022
	8	New	the wire		09/03/2022
	9	Finalised	Adding A Items		07/04/2022

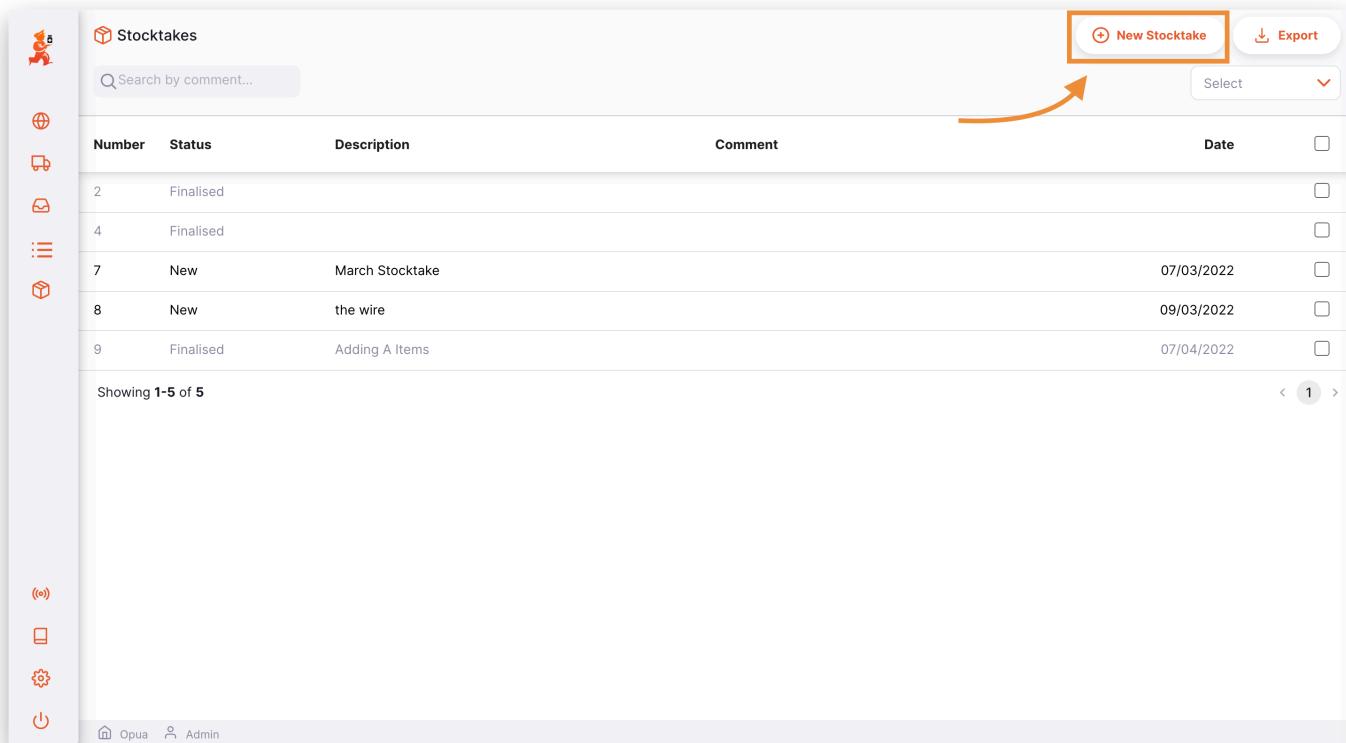
For each stock stake you can see:

- The stock take **number**
- The stock take **status**. There are two stock take statuses:
  - *New*: a stocktake you are still working on
  - *Finalised*: a stocktake that has already been performed. You can no longer edit it.
- A **description** of the stocktake (eg. March Stocktake)
- If any, a **comment** about the stocktake
- The **date** of the stock take

There is little point in keeping old stocktakes with status = NEW, especially if you are about to create a new stocktake containing the same items. Indeed, it can be quite dangerous to leave old stocktakes with status NEW in your system. If time has passed since the stocktake was created, then the snapshot and actual quantities are almost certainly incorrect. For good housekeeping reasons, it is good practice to delete old NEW stocktakes.

## Creating a new stock take

Let's start a new stocktake. To do so, tap on the New Stocktake button in the right corner of the screen.

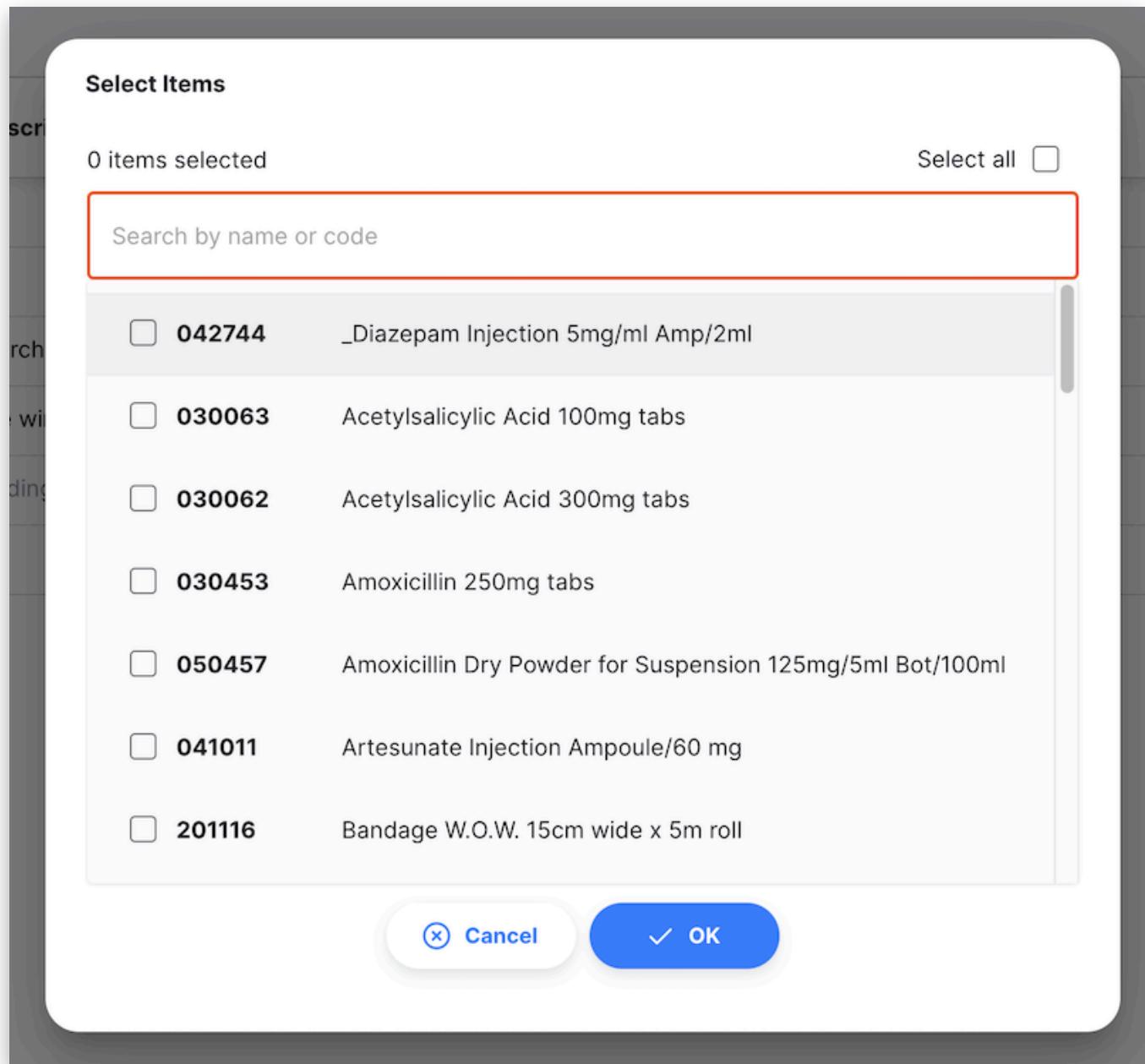


The screenshot shows a mobile application interface for managing stocktakes. At the top, there is a header with a logo and the text "Stocktakes". Below the header is a search bar with the placeholder "Search by comment...". On the far right of the header is a "New Stocktake" button, which is highlighted with an orange rectangular box and an orange arrow pointing to it from the bottom right. The main area of the screen is a table listing five stocktakes. The columns are labeled "Number", "Status", "Description", "Comment", and "Date". The data in the table is as follows:

Number	Status	Description	Comment	Date
2	Finalised			
4	Finalised			
7	New	March Stocktake		07/03/2022
8	New	the wire		09/03/2022
9	Finalised	Adding A Items		07/04/2022

At the bottom of the table, it says "Showing 1-5 of 5". The footer of the app includes icons for home, search, and admin, along with the text "Opua Admin".

A window appears, inviting you to select items to be counted:



## Selecting Items

Select items you wish to count using the check boxes. You can select more than one:

Select Items

1 item selected

Search by name or code

042744 - Diazepam Injection 5mg/ml Amp/2ml

030063 Acetylsalicylic Acid 100mg tabs

030062 Acetylsalicylic Acid 300mg tabs

030453 Amoxicillin 250mg tabs

050457 Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/100ml

041011 Artesunate Injection Ampoule/60 mg

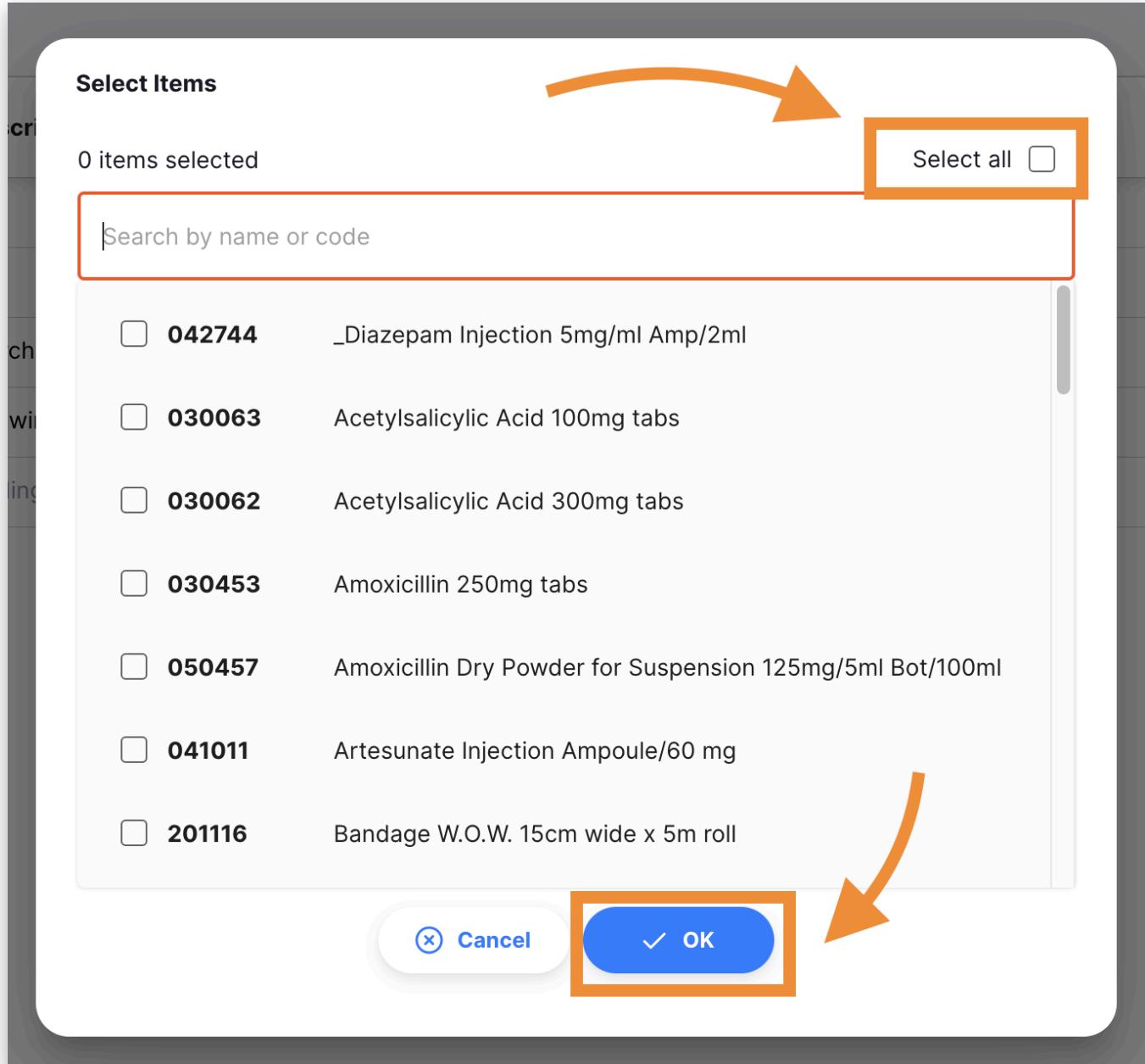
201116 Bandage W.O.W. 15cm wide x 5m roll

(x) Cancel ✓ OK

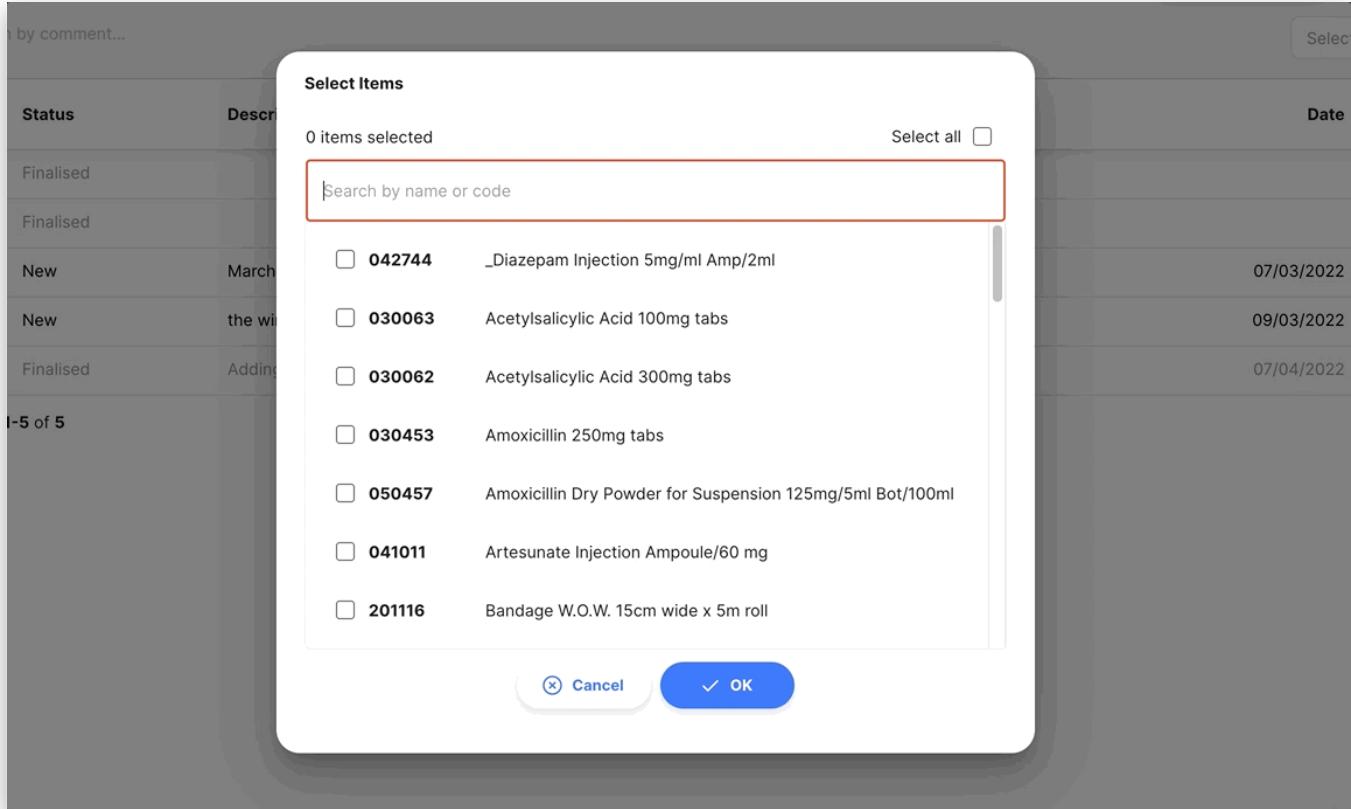
Number	Status	Description	Date
2	Finalised		
4	Finalised		
7	New	March	07/03/2022
8	New	the wi	09/03/2022
9	Finalised	Adding	07/04/2022

Showing 1-5 of 5

If you want to include every item (or most items), check the Select All box and click on OK:



Use the search bar to look for a specific item by typing its name or its code:



Click on OK when you have selected all the items you would like to count.

Don't worry if you forget one item. You will have the possibility to add more items to your stocktake afterwards.

## Printing Stocktake sheet

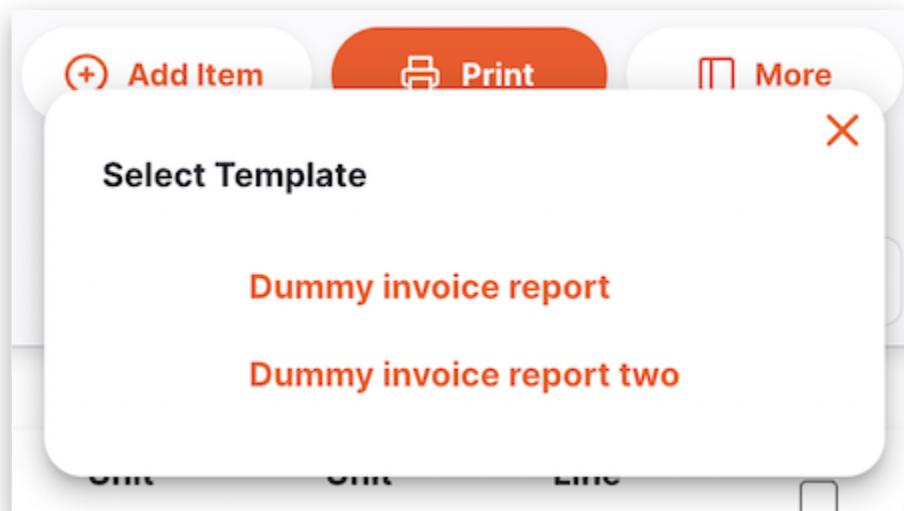
When viewing a specific Stocktake, simply click the Print button which is on the top right of the page. When printing, a PDF file is generated for you, which will then open in a new browser tab. This can then be printed using your browser by clicking print or using control+P (if using windows) or cmd+P keys on your keyboard (if using a mac).



This will either

- Show a menu of possible reports for you to select from before creating a PDF. This will happen if there are more than one report defined for the Stocktake report type.

- Create a PDF immediately, if there is only one report to select from



# Display Settings

The display settings section allows you to customise how the site looks for you. Changes made will only affect your experience - if other people would like to change the logo, for example, they will have to make the change themselves.

Let's explore what's possible...

## Viewing the display settings

To view the display settings, go to `Admin` in the lower section of the navigation panel:

Location: nav

You will see the display settings section at the top of the page:

Location: list

## Language

To change the language, you simply have to select from the drop down list

Language

The selected language will be used for everything you do on the site. If you reload the page or open a new tab, this language will be used. However if you view the site in a different browser (for example Firefox after changing the language in Chrome) you will need to select the language again.

## Custom logo

It is possible to use a custom logo for the site. This shows in the left navigation and on the login screen. For example:

Custom logo login

## Custom logo login

The logo will need to be in the `.svg` format. To update, simply

- enable the custom logo by clicking the toggle switch
- copy the text of the `.svg` file and paste it into the text area
- click save

## Edit custom logo

## Custom theme

You can also configure a custom look for your site by using a custom theme. To do this:

- enable the custom theme by clicking the toggle switch
- you'll see a sample of the current theme in the text area - this shows you what can be updated
- edit the theme and click save to view the results

## Edit custom logo

# Synchronisation

View and manage your storage locations

## Viewing the synchronisation settings

To view the synchronisation settings, go to `Admin` in the lower section of the navigation panel:

Location: nav

You will see the synchronisation section below the display settings:

Location: list

## Updating settings

Be very careful updating these settings! They control how the server connects to the central server and do not usually need to be changed. If you make any changes without consulting the administrator of the central server, it is very likely that you will break the sync connection.