



mSupply Location Management Tutorial

Set up Location types

A location type allows you to group locations together.
Choose Items > Show location types
A list of location types (currently blank) is shown.
Click the **new** button.

| | |
|---------------------------------|--------------|
| Merge two items... | Ctrl+Shift+M |
| Show departments... | |
| Manage item access... | |
| Manage drug interaction groups. | |
| Show units... | |
| Show accounts... | |
| Show item categories... | |
| Show locations | |
| Show location types... | |
| Merge two locations... | |
| Check stock is correct... | |

Enter location type: Cool store

Enter the description "Cool store" and a temperature range then click the **OK** button.

Add new Location type...

1 Description Cool Store

2 Minimum Temperature 4

3 Maximum Temperature 8

Cancel OK

Enter location type: Freezer

Click the **New** button to show the window at the left,
and enter the description "freezer" and a temperature range.

Click **OK** to save and close the window.

Add new Location type...

1 Description Freezer

2 Minimum Temperature -10

3 Maximum Temperature -2

Cancel OK



You now have two location types

Location types are used to categorize locations. They are not compulsory.

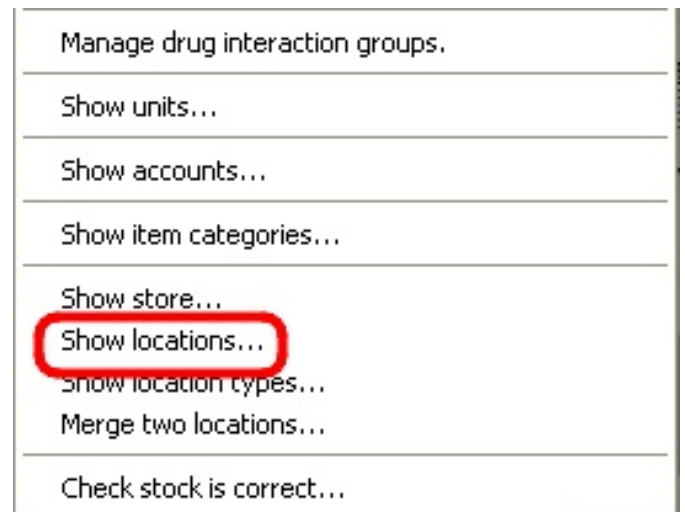


Set up locations

Choose Item > Show locations

A list will be shown with a list of locations.

We will add two locations.



Click the "New location" button to add a location

Enter details for Cool store 1. Give it a code of C.1 (using dots between "levels" to create a hierarchy is a good idea).

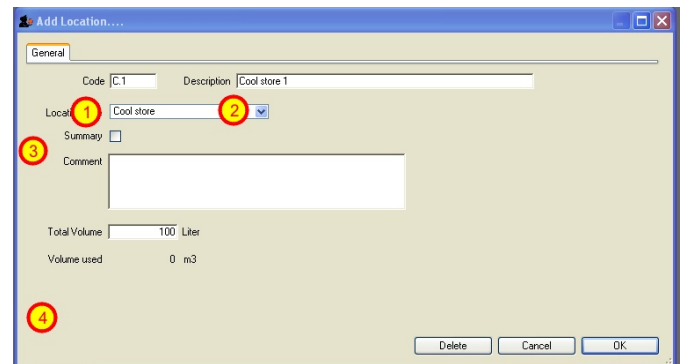
For the volume enter "100L".

Volumes are stored in m3 but you can enter "3ml" or "5L" if you want to enter small volumes.

Click **OK** then click the **New location** button to add a location "C.2" with description "Cool store 2".

When you have finished, click **OK** again and then click **OK** in the locations list window to close it too.

(Note that we can enter "daughter" locations within cool

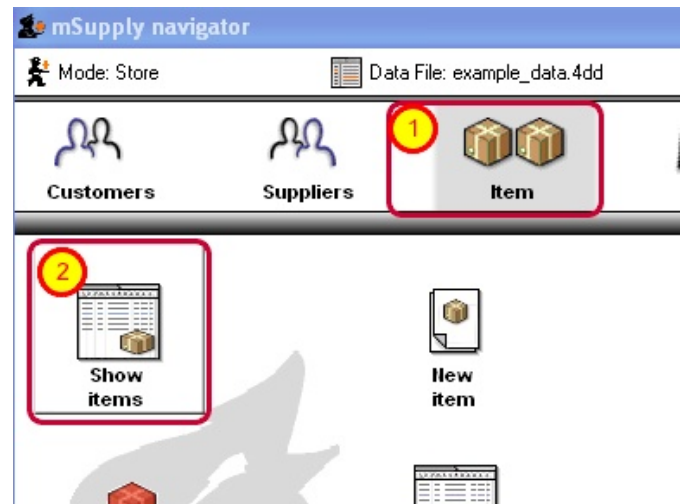




store 2 by making locations "C.2.A", "C.2.B" or "C.2.1."
etc etc...)

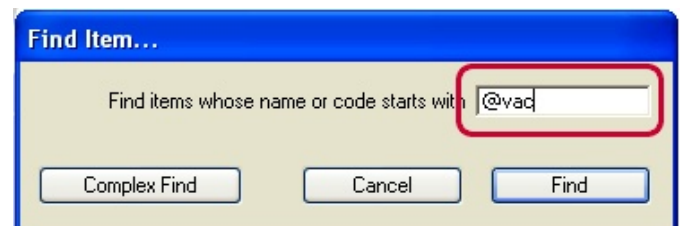
Set up items with default volumes

Choose Items > Show items



Find Vaccines

Type "@vac" into the find window then click **Find**.
This will find all items with "vac" in their name.



Double click on "Measles vaccine" in the list

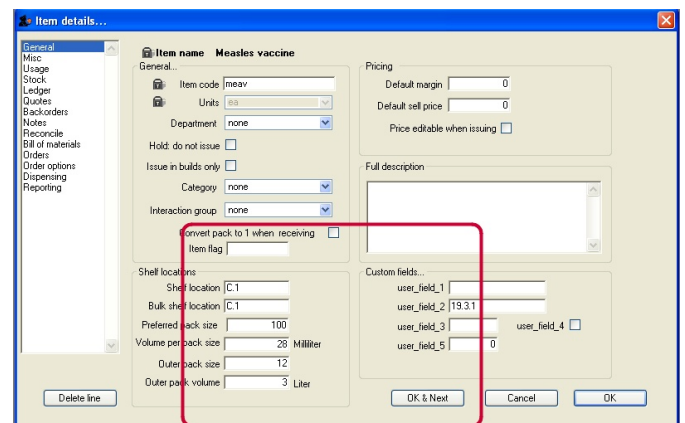
Enter details

Shelf location: C.1 (if you wanted to see a list of all
locations starting with "C" enter "c" and press the <tab>
key)

Preferred pack size: 100

Volume per pack size: 2.8L (This is the volume for the
preferred packsize on the line above)

Outer pack size: 12 (This is how many of the packs
above make up a larger pack (So here in a larger pack
there are 1200 units in total)





volume per outer pack: 40L

Click **OK** to close the window.

Double click on Hepatitis B vaccine inj in the list

Enter details:

Locations: C.2

Preferred pack size: 24

Volume per pack: 216ml

Outer pack size: 50

Outer pack volume: 11L

Click **OK** to close the window.

Enter a purchase order for these two vaccines

Choose **Supplier** > **New blank purchase order**



The purchase order window is shown

In the **Name** field enter "a" then press <tab>. Arbutle distribution will be filled in as the supplier as they are the only supplier starting with "A"

Click the **New line** button.

The purchase order line enter window will be shown.

New Purchase order...

Order num : 12 1 Name

General Details Non-stock items Receipt Invoices Log Location

2

show all lines

| Ref | Item | Orig Qty | pack | Adj. Qty | Tot. re... |
|-----|------|----------|------|----------|------------|
|-----|------|----------|------|----------|------------|

Enter Hepatitis B vac on the purchase order

Type "hep" then press <tab> and double-click the Hep B vaccine in the list.

Notice that the volume and pack size have been filled in for you. You can of course edit them, but usually you won't have to.

Use the <tab> key to move from field to field. Enter "100" for the quantity (Number of packs), making a total of 2400.

Click **OK & Next** to save the details and proceed to a blank window ready to enter the next line.

New order line...

General Usage Quotes Receipt history Ledger

1

Location
Volume per pack size
Shelf location

Original order

| Number of packs | Pack size | Total Quantity | Units (ea.kg/ml) | Supplier item |
|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|
| <input type="text" value="0"/> | <input type="text" value="1"/> | <input type="text" value="0"/> | <input type="text" value="0"/> | <input type="text" value="0"/> |

Pricing for this item

| Price before discount | discount (%) | Price after discount | Extension |
|--------------------------------|--------------------------------|--------------------------------|--------------------------------|
| <input type="text" value="0"/> | <input type="text" value="0"/> | <input type="text" value="0"/> | <input type="text" value="0"/> |

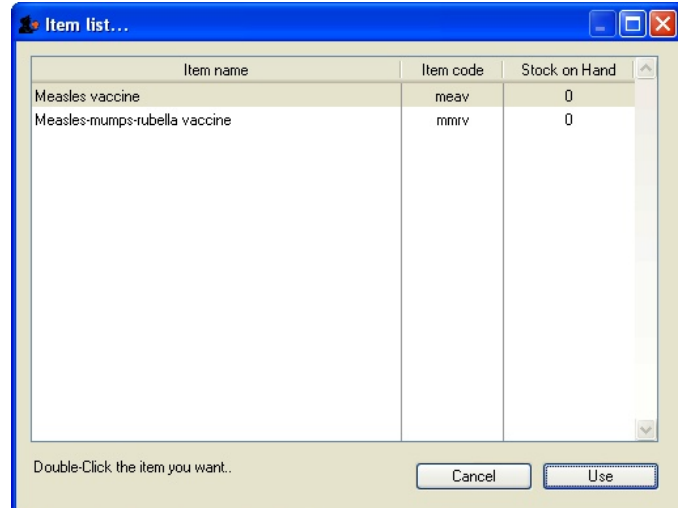
2

| On hand | On backorder | On order | Received on previous deliveries |
|--------------------------------|--------------------------------|--------------------------------|---------------------------------|
| <input type="text" value="0"/> | <input type="text" value="0"/> | <input type="text" value="0"/> | <input type="text" value="0"/> |



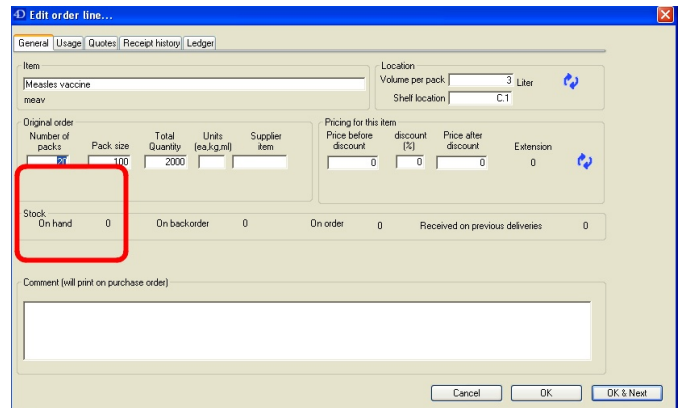
Type "meas" and press <tab> (NOT <Enter>)

The list of items starting with "meas" is shown.
Double-click the one you want (the first one in the list).



Enter details for this Measles vaccine purchase order line

Tab to the Number of packs field and enter a quantity of "20".
Click **OK** to save the details and return to the purchase order window.

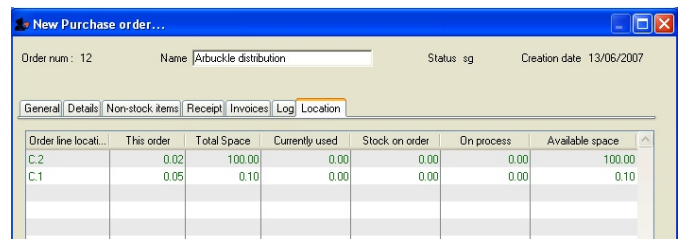


Click the "Location" tab to see volume projections

Here you are shown if the purchase order will cause a problem with space at the chosen locations.
As there is no stock at the locations, and there is plenty of space at each location, this order won't create a problem.

For location management we have implemented row colouring to signify space availability:

- Green: more than 10% free
- Orange: less than 10% free
- Red: not enough space available





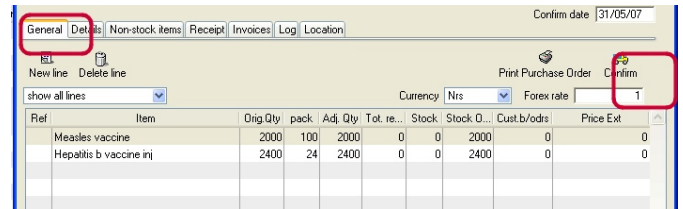
You'll notice that both rows are coloured green: there is enough space at the chosen locations.

Confirm the Purchase Order

Click on the "General" tab and then click the "Confirm" button. The order is ready to be sent to the supplier. Once an order is confirmed, any subsequent purchase orders will take the quantities on confirmed orders into account, both from the perspective of calculating required quantities, and from a location management perspective.

Note that there is no obligation to fill in prices, although it may be useful for management purposes, even if you are not paying the supplier for goods received.

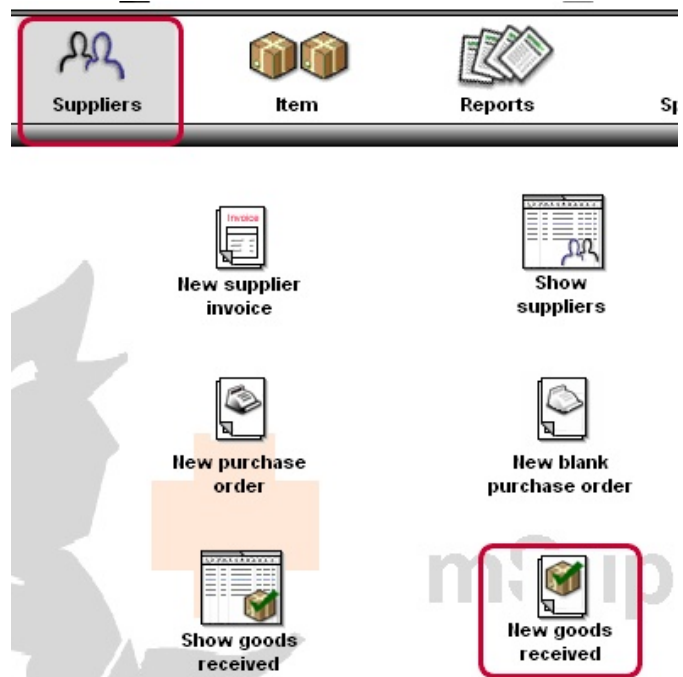
Click **OK** to close the window.



Receiving Goods

Let's suppose the purchase order is sent, and the supplier has sent all the goods in one consignment (we should be so lucky!)

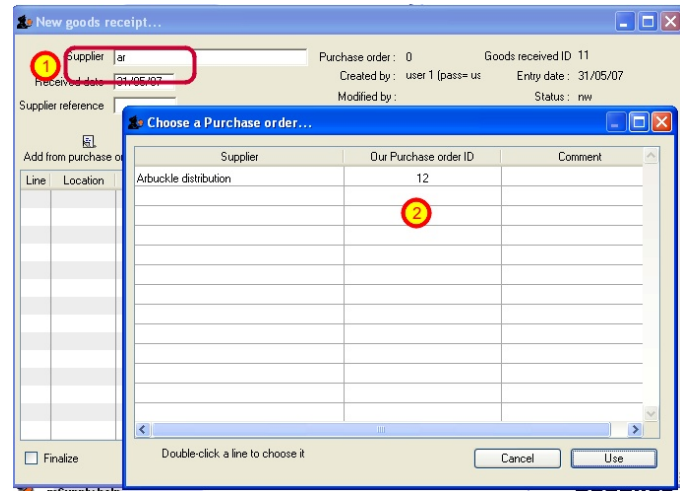
In the Navigator, click **Supplier** then **New Goods Receipt**





Enter the Goods Receipt

In the name field type "ar" and press <tab>. Orders for suppliers starting with "ar" will be shown. There will just be the order we've entered. Double-click it to choose it.

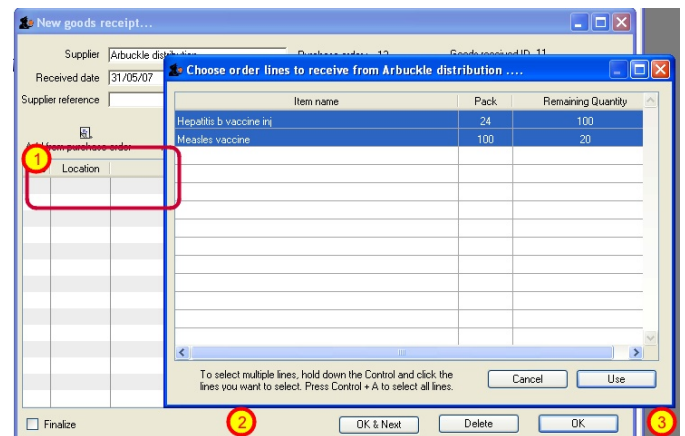


Add lines to the goods receipt

Click **Add from purchase order** button to add purchase order lines.

Press <control> and "A" to select all lines in the window.

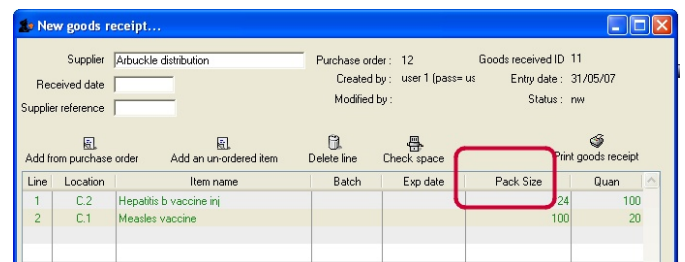
Click **Use** to choose the lines and close the window.



Check Space

The lines have been added to the goods receipt. Click the **check space** button. Lines without sufficient space will be coloured orange or red as above.

Normally you would double-click each line to add batch and expiry details. Doing so also shows location details and allows you to over-ride the location you specified when ordering the goods.





View details for a Goods received line

Double-click the Hepatitis B vaccine line, and the details for the line are shown.

It also allow to edit the details. However, if you wish to get the default Shelf location and Volume per pack size click the blue refresh button next to each field.

Item: Hepatitis b vaccine inj

Quantity: 100

Pack: 24

Total quantity: 2400

Batch:

Expiry: 00/00/00

Shelf location: C.2

Total capacity: 150 Liter

Available space: 150 Liter

Volume per pack size: 216 Milliliter

Space required: 21.6 Liter

Buttons: Cancel, OK, OK & Next

Accept the Goods receipt

Click the **Finalize** check-box and then click **OK** to accept the goods receipt, close the window and make a supplier invoice. The supplier invoice window is now shown.

Finalize

Buttons: OK & Next, Delete, OK

Put goods into stock

Uncheck the **hold** checkbox and then click **OK**
The goods are now in stock.

Other charges

Item(s):

Amount: 0

Margin: 0.00

Subtotal: 0

% tax: 0.00

Total: 0

Buttons: OK & Next, Delete, OK

View volume by item

If you follow the instructions at the beginning of this tutorial and look up an item, you can see the volume used by each batch of an item.

As goods are issued the volume will drop.

Item name: Hepatitis b vaccine inj

Buttons: Show zero lines, Print, Split

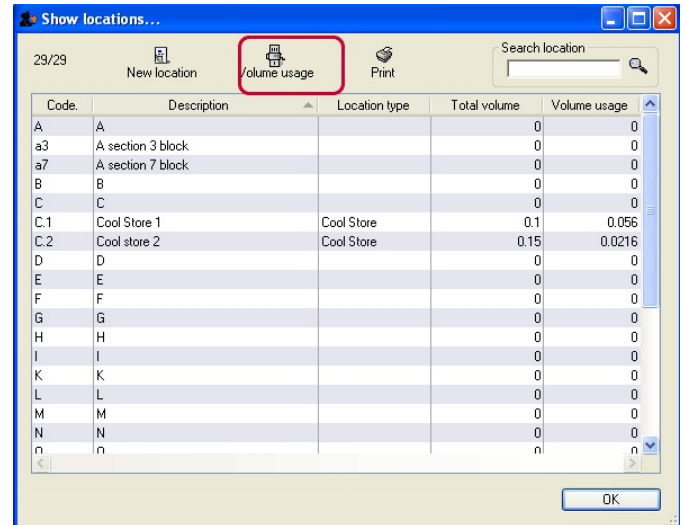
| Line | Available | Total | Pack | Hold | Batch | Manufacturer | Expdate | Total Volume | Supplier | Location | Cost |
|------|-----------|-------|------|--------------------------|-------|--------------|---------|--------------|----------|----------|------|
| 1 | 100 | 100 | 24 | <input type="checkbox"/> | | | | 0.0216 | arbuuck | C.2 | |



Show volumes by location

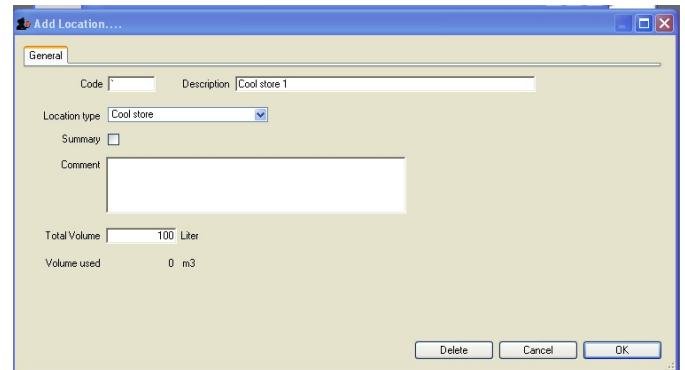
Choose **Items > Show location**, then click the **volume usage** button. A column will be added showing the volume used, along with the total volume.

In the Report menu the same information is displayed in a printable report. This is also accessible by clicking the **Print** button in the locations window.



Things we're planning to do

- * Add summaries, so that the location window can summarize locations to level one, two or three (using a dot in the location code to denote breaks between each level). We know it's more useful to see the big picture of total volume available rather than the details.
- * Colour the location window rows green/orange/red, and do the same for summaries.
- * Draw a graphical layout of a warehouse to display the same info as the location window.
- * Wait to hear back from (potential) users to better understand what is needed.



1 PM Bidya Re: Flights for the Glov
4 PM Ashok Singh Greetings from Ashok
22 PM whitsunday Merry Christmas from
8 PM Jutta Frank Greetings from the Fi
7 AM MANes Re: Application and C.'
'M Quentin Stevenson Hello
20 AM Sajan Ojha dear sir application for
'M Sajan Ojha Re: dear sir applicati
AM Quentin Stevenson Bruce Colstic
'M Ujwal Khatry Re: M supply installme
2 PM RameshRaj Inquiry!