

# 3.06. Customers, suppliers and contacts

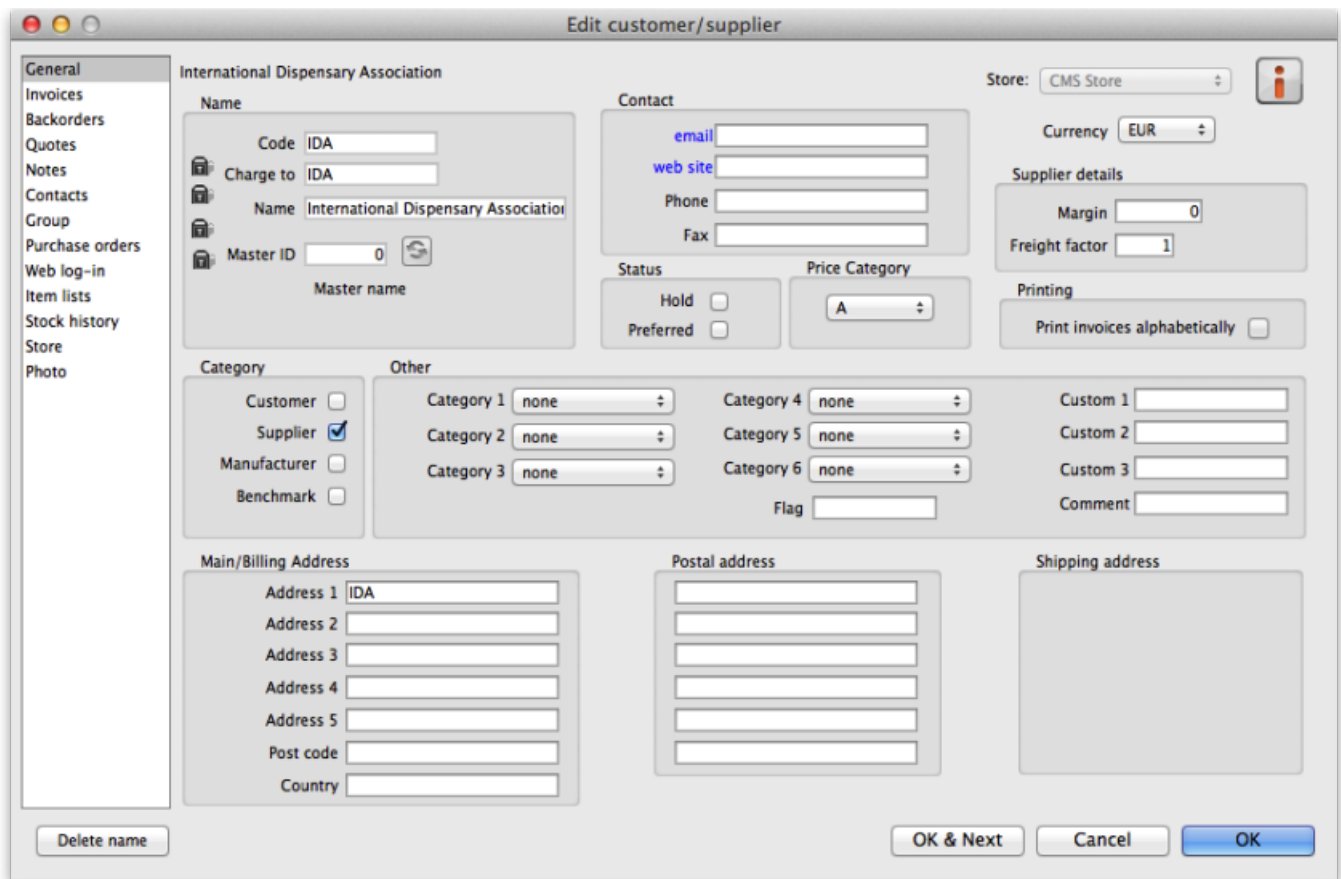
## Adding a customer or supplier

For this tutorial example, we will first add a new supplier, then add a new customer.

### Adding a supplier

From the Navigator's opening screen, click on the 2nd of the large icons, **Suppliers** tab, then on the **New Supplier**

You will be shown this window to enter the details:



You can now enter the details for your new Supplier.

| Field | What to do....   |
|-------|--|
| Code  | Enter "Acnep" to identify the Supplier (Acme Pharmaceuticals). You need to choose a unique code for each name. Try to choose a logical system, as the code is used to look up the Supplier (or Customer) when you are entering invoice data. (for example, try to start the code with at least the first three letters of the Supplier name) |

| Field                           | What to do....  |
|---------------------------------|---|
| Charge to                       | Enter "Acme" again. This field is only used when exporting data to an accounting program - this code must match the code you use for the supplier in your accounting program.   |
| Name                            | Enter "Acme Pharmaceuticals" - the name of our supplier.  |
| Master ID                       | Ignore for now  |
| Category                        |   |
| Customer check box              | Leave this box unchecked, as we are entering a new Supplier.  |
| Supplier check box              | As you chose "new supplier" this box is already checked.  |
| Manufacturer                    | Leave unchecked   |
| Benchmark                       | Leave unchecked   |
| Contact                         |   |
| Email, Web site etc.            | Fill in with the appropriate details  |
| Status                          |   |
| Hold checkbox                   | If this box is checked for supplier or customer, that particular supplier or customer can neither supply nor be supplied with items.  |
| Preferred checkbox              | Leave unchecked   |
| Price Category                  | This applies to customers. It is possible to assign multiple sell prices to customers. Leave it set to "A".   |
| Supplier details                |   |
| Currency                        | The field is automatically filled in with "Nrs" (=Nepali rupees - the default currency in our example data). This is the currency that this supplier will use to bill us.   |
| Margin                          | Enter "10". Items purchased from this supplier will have a 10% margin added to calculate the selling price.   |
| Freight factor                  | Enter "1". Acme Pharmaceuticals does not charge any freight to us. Their prices are "CIF"(Cost, Insurance & Freight to named port). This field is only used for comparing quotations from suppliers - it is not used for actual invoices. |
| Other                           |   |
| Category 1-6                    | Ignore for now  |
| Custom 1-3                      | Ignore for now  |
| Flag                            | Ignore for now  |
| Comment                         | You can enter a brief note here (Ignore it for now)   |
| Print invoices                  | Ignore for now  |
| Address                         |   |
| Address, Main & Postal address. | You can complete these with appropriate values.   |

If you are satisfied with the details, click **OK** . You will be returned to the mSupply® startup screen.

## Adding a customer

From the Navigator's opening screen, click on the 1st of the large icons, *Customers*, near the top of the screen, and then click on "New Customer" from the Navigator screen that appears. You will be presented with a window similar to the *New Supplier* one above to enter the details:

Fill in the fields as follows:

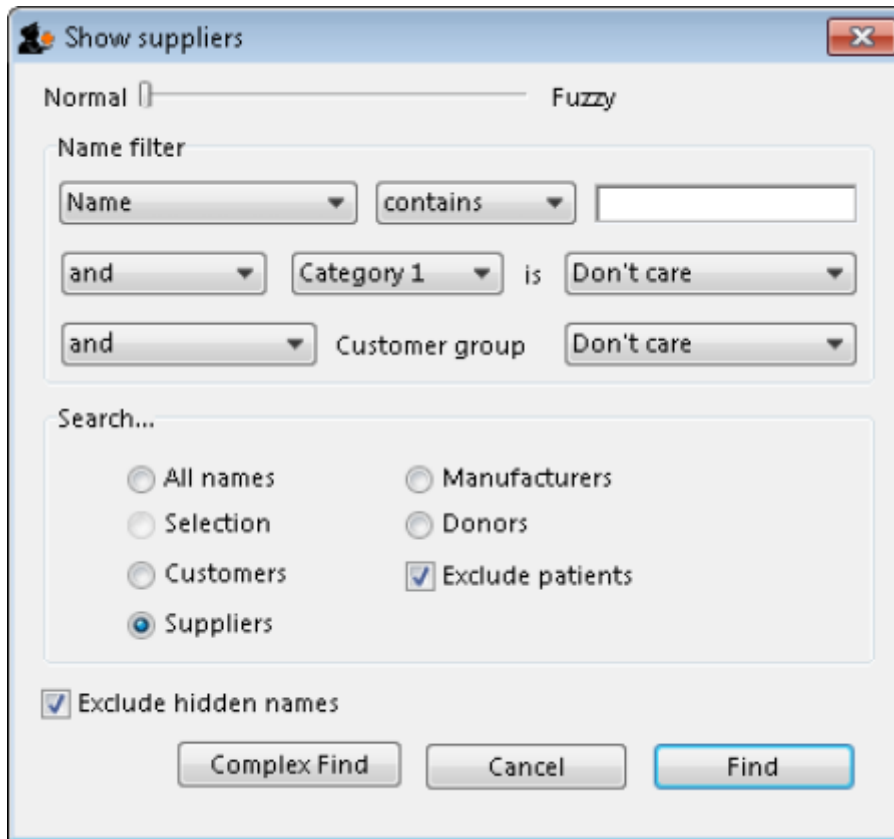
| Field                                       | What to do   |
|---|--|
| Code  | Enter "bluec"  |
| Charge to                                   | Enter "bluec"  |
| Name  | Enter "Blue Cross Hospital" - the name of our customer.  |
| Master ID                                   | Ignore for now   |
| Category                                    |  |
| Customer check box                          | As you chose "new customer" this box is already checked.   |
| Supplier check box                          | Leave this box unchecked, as we are not entering a new Supplier.   |
| Manufacturer, Benchmark check boxes         | Leave these unchecked too  |
| Status                                      |  |
| Hold checkbox                               | If this box is checked for supplier or customer, that particular supplier or customer can neither supply nor be supplied with items. |
| Price Category                              | This applies to customers. It is possible to assign multiple sell prices to customers. Leave it set to "A".                          |
| Contact                                     |  |
| email, web site, etc.                       | You can complete these with appropriate values.  |
| Other                                       |  |
| Category 1-6                                | Ignore for now   |
| Custom 1-3                                  | Ignore for now   |
| Flag  | Ignore for now   |
| Comment                                     | You can enter a brief note here (Ignore it for now)  |
| Print invoices                              | Ignore for now   |
| Addresses                                   |  |
| Address, Main, Postal and Shipping address. | You can complete these with appropriate values.  |

Click the *OK* button to save the details and exit the window.

## Editing a customer or supplier

Let's now look up "Acme Pharmaceuticals"

- Choose *Show suppliers ...* from the Navigator's *Supplier* screen. You are presented with a window to enter as much of the Supplier name or the code as you know.



For this tutorial, just click the *Find* button - you will get a full list of all suppliers.



For information on the Normal - Fuzzy slider, see [Editing a Customer, Supplier or Manufacturer](#)

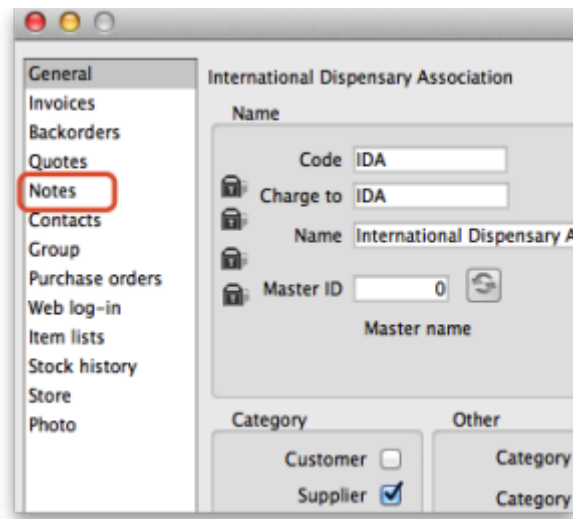


- Double-click the “Acme Pharmaceuticals” entry in the list. You will be shown a window the same as you used to enter “Acme Pharmaceuticals” as a new supplier.

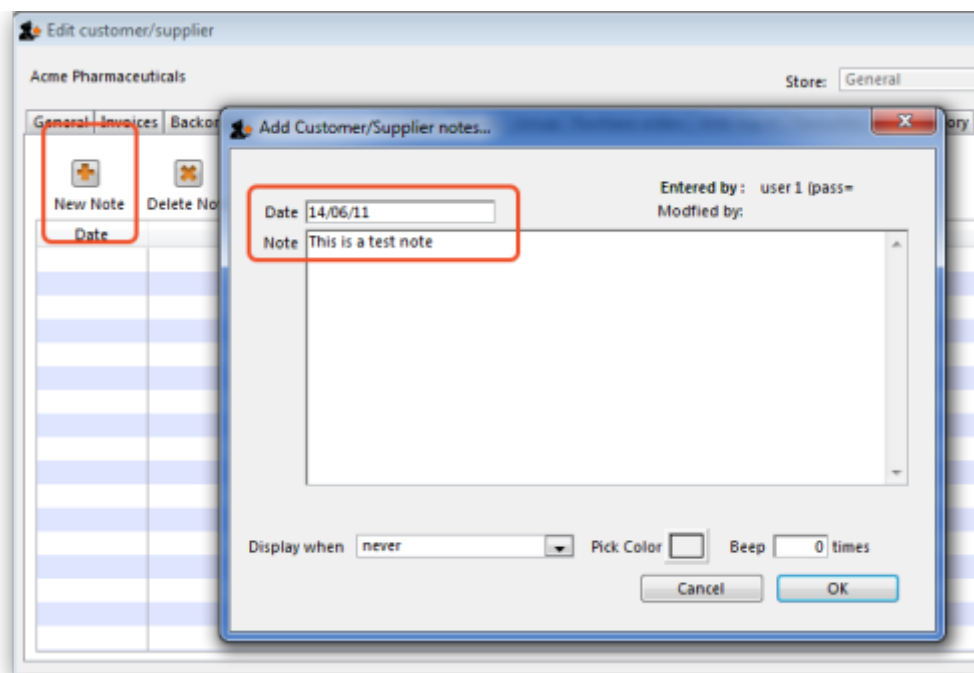


- Note the window has “Tabs” down the left side in the sidebar: “General”, “Invoices”, “Backorders”, “Quotes” and “Notes”, etc. Let's add a note for Acme pharmaceuticals:

- Click on the “Notes” tab.



- Click on the *New Note* button. Today's date is entered automatically and highlighted. Click inside the Note Entry field.
- Enter “This is a test note” then click the *OK* button.



- The first line of your note text will appear in the list of notes.
- Click *OK* to exit viewing/editing the supplier, then click *OK* again to exit the list of suppliers.

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