

# 16.04. mSupply customer web interface: guide for customers

The first section of this page covers the use of the interface itself by the customer. There is a small [Back at the supplying store...](#) section at the end which describes what happens in mSupply in response to the orders sent by the customer.

## Logging in

You will be given an website address for the customer interface. e.g. <http://example.com:8080/customer/>. Go to that address using an internet browser running on a smartphone, laptop, tablet or desktop computer etc.

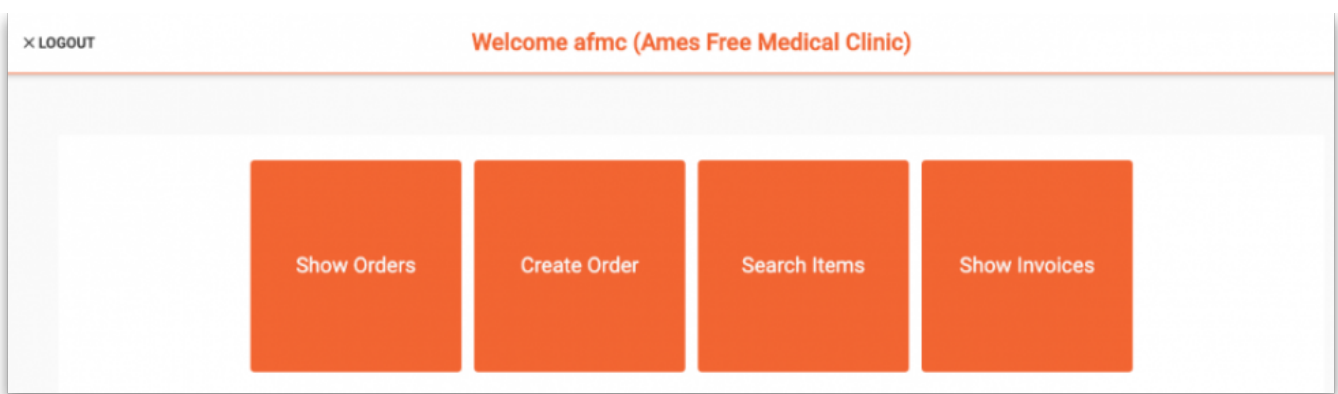
When it has loaded (the time this takes will depend on the speed of your internet connection), you will be shown the login page:

The image shows a login form for the mSupply Customer interface. At the top, the text "mSupply Customer" is displayed in a bold, orange font. Below this, there is a label "Username" followed by a horizontal input field. Underneath the input field, there are five small grey dots representing a password field. Below the password field, there is another horizontal input field. At the bottom of the form, there is a grey rectangular button with the word "LOGIN" in white, uppercase letters.

Enter your username and password and click **Login**

## The navigator

You are now shown the mSupply customer navigator screen:



Here we are logged in as user “Mike.Smith” who works for the customer “Alpha Clinic”.

The “Alpha Clinic” is set to use the store “General Warehouse” as their supplying store.

Click on:

- [Show Orders](#) to view a list of orders that have been created but not yet completed.
- [Create Order](#) to create a new order for stock from the supplying store.
- [Search Items](#) to search a list of Items available in the supplying store.

## Show orders

Select **Show Orders** to display a list of orders that have been created.

The screenshot shows the 'Show Orders' page. At the top, there is a navigation bar with a 'HOME' link, the title 'Show Orders', and two buttons: 'DELETE' and 'VIEW/EDIT'. Below the navigation bar is a table with the following data:

NAME	ORDER NUMBER	STATUS	ENTERED DATE	AMOUNT (APPROX.)
Alpha Clinic	32	wp	2019-06-10	0
Alpha Clinic	31	wf	2019-06-06	0
Alpha Clinic	28	wf	2019-06-06	0

To view or edit an existing order, click on the order in the table to highlight it, then click on the **View/Edit** button (top right)

To delete an existing order, click on the order in the table to highlight it, then click on the **Delete** button (top right)

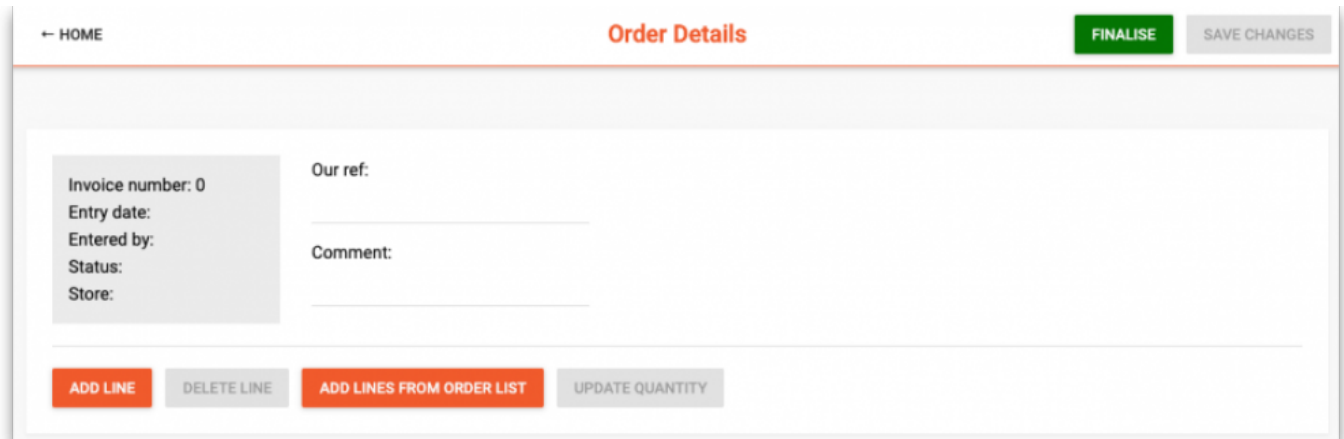
Status wp indicates web interface orders that have been created and are still in progress (not yet finalised). These can be edited/deleted.

Status wf indicates web interface orders that have been finalised by the customer. These can be viewed, but not edited or deleted.

Click on **HOME** (top left) to return to the main options screen.

## Create orders

Click on **Create Order** to display the screen for entering an order:



← HOME **Order Details** FINALISE SAVE CHANGES

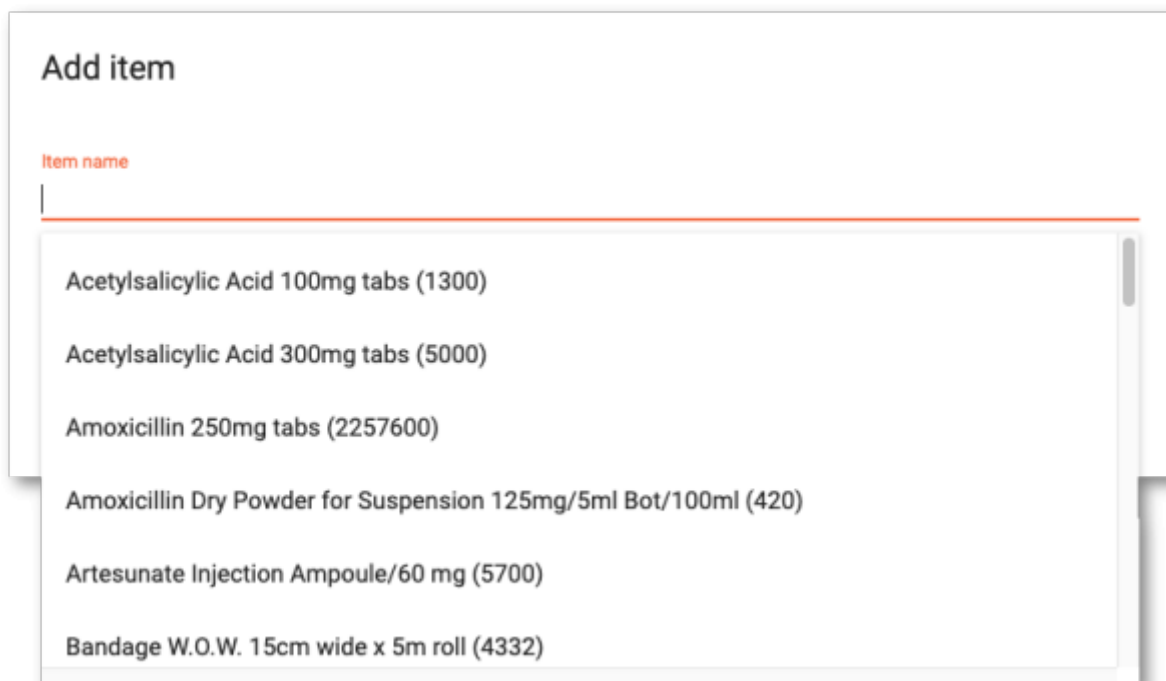
Invoice number: 0  
Entry date:  
Entered by:  
Status:  
Store:

Our ref:  
Comment:

ADD LINE DELETE LINE ADD LINES FROM ORDER LIST UPDATE QUANTITY

To add an item to the order, click the **Add line** button.

In the pop-up window clicking the **Item name** field will open a drop down list to select from



Add item

Item name

Acetylsalicylic Acid 100mg tabs (1300)

Acetylsalicylic Acid 300mg tabs (5000)

Amoxicillin 250mg tabs (2257600)

Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/100ml (420)

Artesunate Injection Ampoule/60 mg (5700)

Bandage W.O.W. 15cm wide x 5m roll (4332)

Enter the quantity and click **Add to order** to proceed

### Add item

Item name  
**Acetylsalicylic Acid 100mg tabs (1300)**

Quantity

**CANCEL** **ADD TO ORDER**

Repeat this to add further items to your order.

← HOME **Order Details** **FINALISE** **SAVE CHANGES**

Invoice number: 0  
Entry date:  
Entered by:  
Status:  
Store:

Our ref:  
Comment:


**ADD LINE** **DELETE LINE** **ADD LINES FROM ORDER LIST** **UPDATE QUANTITY**

ITEM CODE	ITEM NAME	PACK SIZE	UNIT PRICE	PRICE EXTENSION	QUANTITY
030063	Acetylsalicylic Acid 100mg tabs	100	0	0	500

Information can be entered in the fields **Our ref** and **Comment**, but these are optional.

If you wish to continue working on the order later, click the **Save changes** button.

When you have completed the order, click on the **Finalise** button. This will submit the order to the supplying store in mSupply and no further changes will be possible. It will now be visible under the *Show Orders* option **until the supplying store processes it**. It is also visible and available for processing in mSupply at the supplying store.



A note for the mSupply user processing the order in the warehouse:

The customer's order will appear in mSupply Desktop as a customer invoice with 'wf' (web finalised) status. This means the customer can no longer edit the order but the Desktop

 user can edit the order. The customer invoice displays the customer's order with placeholder lines by default. This gives the mSupply Desktop user control to choose the stock for the customer's order.

To choose stock see the re-distribute section: [Redistribute placeholder lines](#).

## Using an order list

If you have been assigned an Order List of the items you are allowed to order, this can be used when you are creating an order. Clicking the **Add lines from Order list** button will display the items on the list(s) defined for the customer logged in.

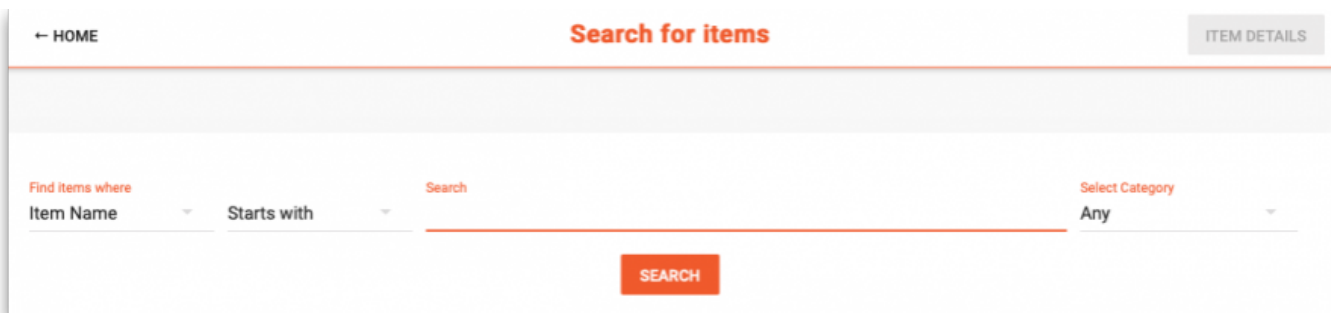
 For setting up a default order list, see [Names: Using, adding and editing](#)

The list will be displayed with the items in the same order as was specified when setting up the list in mSupply.

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## Search items

Click **Search Items** to make a search of items available in the supplying store. It will display this screen:



Choose your search options using the selectors and enter something to search for in the textbox (or leave it empty to list all the items). Click on **Search** and the search will be made. When the search is complete the list of items matching your search criteria will be displayed:


The screenshot shows the 'Search for items' page. At the top left is a 'HOME' link. The title is 'Search for items' and there is an 'ITEM DETAILS' button on the right. Below the title is a search form with 'Find Items where' and 'Select Category' dropdowns. The search criteria are 'Item Name' (Starts with 'amox') and 'Any' category. A 'SEARCH' button is in the center. Below the search bar is a table with columns 'CODE', 'ITEM NAME', and 'STOCK ON HAND'. The table lists four items: Amoxicillin 250MG (Amoxil) with stock 0, Amoxicillin 500MG (Amoxil) with stock 180, Amoxicillin 875MG (Amoxil) with stock 0, and Amoxicillin 250mg/5ml (100ml) suspension with stock 0.

CODE	ITEM NAME	STOCK ON HAND
228264011	Amoxicillin 250MG (Amoxil)	0
172741470	Amoxicillin 500MG (Amoxil)	180
172741142	Amoxicillin 875MG (Amoxil)	0
00143988901	Amoxicillin 250mg/5ml (100ml) suspension	0

Click the row of a specific item and click on **Item details** to see the details:

The screenshot shows the 'Search for items' page with the 'Item details' modal open for the item with code 172741470. The modal displays the following information: Item code: 172741470, Item name: Amoxicillin 500MG (Amoxil), Total stock on hand: 180, Category: Antibiotics, Department: Antibiotics, and Description: (blank). Below this information is a table with columns 'PACK SIZE', 'AVAILABLE', 'BATCH', 'EXPIRY', and 'SELL PRICE'. The table lists two rows of data: one with pack size 1, available 78, expiry 0000-00-00, and sell price 5.88; and another with pack size 1, available 102, expiry 0000-00-00, and sell price 5.88. A 'CLOSE' button is at the bottom right of the modal.

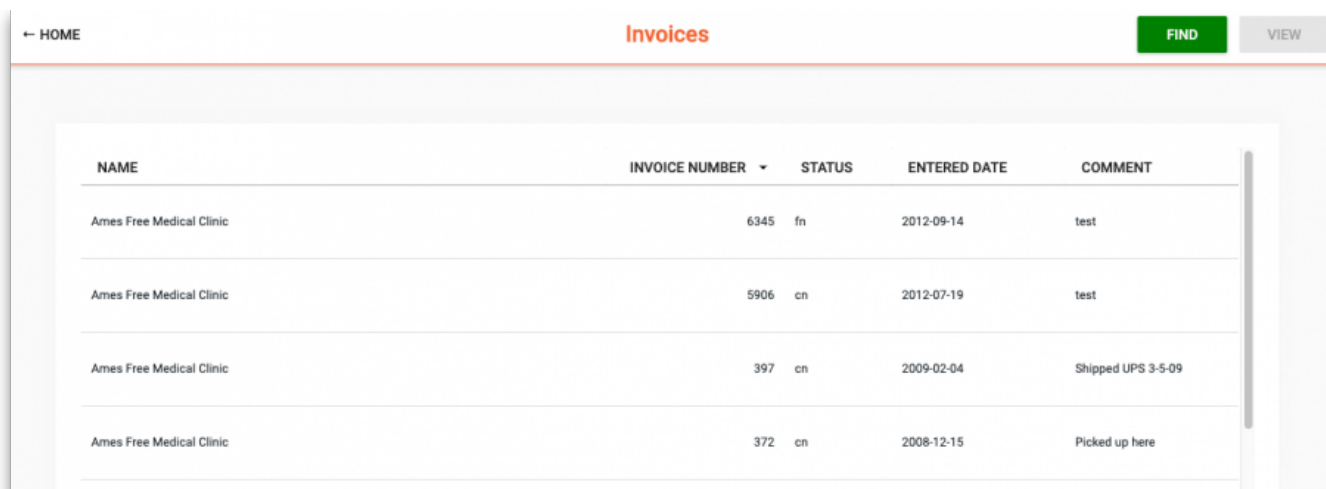
PACK SIZE	AVAILABLE	BATCH	EXPIRY	SELL PRICE
1	78		0000-00-00	5.88
1	102		0000-00-00	5.88

 Note: The *Stock on Hand* figure is the **supplying store's** stock on hand, not the **Customer's** stock on Hand.

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## Show invoices

Select **Show Invoices** to display a list of invoices that have been created:



The Status indicates at what stage the invoices are in processing:

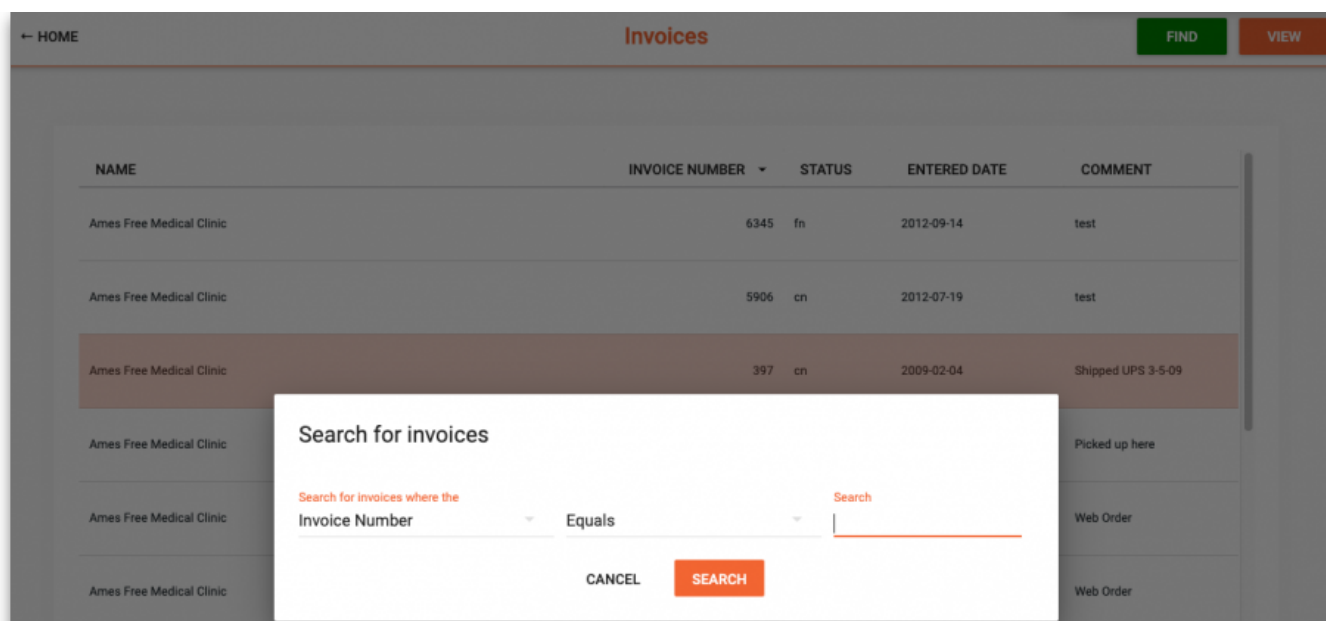
- sg (suggested) indicates invoices which the supplier has not yet started to process.
- cn (confirmed) indicates invoices which are being processed (filled) by the supplier.
- fn (finalised) indicates invoices which have completed being processed by the supplier and the stock should be on its way to you.

To find a particular invoice details, click the row of a specific invoice and do the following:

To view details of an existing invoice details, click the row of a specific invoice and do the following:

### Find

Click on **Find** to make a search of invoices available based on the search options provided:



## View

Click on **View** to see the invoice details:

The screenshot shows the 'Invoices' section of the mSupply interface. At the top, there is a navigation bar with a 'HOME' button, the title 'Invoices', and 'FIND' and 'VIEW' buttons. Below this is a table of invoices with columns for NAME, INVOICE NUMBER, STATUS, ENTERED DATE, and COMMENT. The table contains several rows for 'Ames Free Medical Clinic'. A modal window is open over the first row (invoice number 6345), displaying the following details:

- Invoice number: 6345
- Entry date: 2012-09-14
- Entered by: Christian
- Status: fn
- Store: General
- Name: Ames Free Medical Clinic
- Their ref:
- Comment: test
- Confirm date: 2012-09-14

Below the details, there is a table of items:

ITEM CODE	ITEM NAME	QUANTITY
71015523	Lipitor 10MG (Atorvastatin)	30

The modal window also includes a 'CLOSE' button at the bottom right. The background table shows other invoices with various statuses and comments like 'Shipped UPS 3-5-09', 'Picked up here', 'Web Order', and 'This is not a bill amount due'.

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## Back at the supplying store...

All orders finalised in the customer interface are sent to the customer's supplying store in mSupply. The mSupply operator logged into the supplying store will see these orders as **wf** status customer invoices.

These invoices contain placeholder lines representing the quantities ordered by the customer. The mSupply operator at the supplying store must then assign stock to these lines in the normal way (see the [Editing a placeholder line on an invoice](#) and surrounding sections for details).

As soon as the operator has closed the **wf** status invoice and closed it again (whether they have edited it or not) in mSupply, the invoice is changed to **sg** status (unless it has been placed on hold) and it will no longer be visible in the customer interface.

When stock has been applied to the various lines, the invoice is processed in the normal way (see the [Issuing goods to a customer \(customer invoices\)](#) section for details) to create the picking list and dispatch note as required before the goods are dispatched to the customer.

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