4. Configuring the Store and Dispensing

Making items visible in the new store using Master List(s)

1. Click on the **Master Lists** tab and select at least one Master List.

| C | General | Preferences | Logo | Synchronization | Custom fields | Master Lists |
|------------|----------|-------------|--------------|-----------------|---------------|-----------------|
| | | | List name | | | Use master list |
| Gryffindor | All Item | S | | | | |
| | | | | | | |

- 2. Click **OK**
- 3. Click **OK** again

Setting up the correct synchronisation settings

If you have used <u>store_create_from_name</u> for creation of the store, and you have specified the sync site that the store will be **Active** on, then all you need to do here is:

- Change the Synchronisation type for this store on the Primary Server to **Collector** if so desired (normally the case)
- Configure this new store's Sync type to be **Transfer** or **Active/Collector** for any *other* sync sites that need to deal with this store.
- Edit store synchronisation settings (Special > Show Stores > Double-click on store > Synchronisation > Click to Unlock, enter code to edit):
- In the table below, in row of the Sync site that was created for this store, tick the tickbox in the Local column. This will automatically change the Sync type for that site to Active/Collector.

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|------------------|--------------------------|-------------------------------|-----------------------------|----------------|------------------|------------|
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| Synchronis | ation type : Active store | | | | | | |
|------------------------|---------------------------|------------------|------|----------------|------|--|--|
| Set as I | ocal store | | | Click to un-lo | ick. | | |
| | | | | | | | |
| Include | prescriptions in sync | | | | | | |
| Sync ID | | | | | | | |
| Sync ID Sync with : | 5 | | | | | | |
| Sync With . | User name | Sync type | Los | - | | | |
| 7 | General | None | * | - | | | |
| 6 | Hogwarts Dispensary | None | .0 | | | | |
| 2 | Gryffindor | None | • 0 | | | | |
| 3 | Hufflepuff | None | | | | | |
| 4 | Slytherin | None | . 0 | | | | |
| 5 | Mobile Store 1 | Active/collector | - 14 | | | | |
| | | | | - | | | |
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- 3. Set Synchronisation type at the top to Collector
- 4. Click **OK**

Make the Store visible to other Stores

1. Edit the 'name' associated with the Store and configure visibility to other Stores appropriately

Custom settings

These are set on the **Custom fields** tab of the store preferences in mSupply desktop (**Special > Show Stores**, Double-click on store **> Custom fields tab**).

| Setting name | Allowed Value(s) ¹⁾ | Description |
|------------------------|-----------------------------------|------------------------------------------------------|
| | | Needs to be set to true if dispensing (see below) |
| usesDashboardModule | true or false | Needs to be set to true if using the dashboard |
| usesVaccineModule | true or false | Needs to be set to true if using the vaccines module |
| usesCashRegisterModule | true or false | Needs to be set to true if using the cash register |

| Setting name | Allowed Value(s) ¹⁾ | Description |
|-----------------------------------------|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| usesPaymentModule | true or <i>false</i> | Needs to be set to true if handling cash payments. There are some (good!) side effects if this setting is true: The sell and cost price columns are shown on Supplier Invoices and are also shown when editing batches in a stocktake where the sell price is editable. See below for examples. |
| usesPatientTypes | true or false | If set to true then you can choose between "Inpatient and Outpatient" when dispensing. The data is stored in the transact.user1 field. Of course, <u>usesDispensaryModule</u> must be set to true for this to have any effect (see above) |
| monthsLeadTime | | The months of lead time - will be multiplied by 30 to use in mobile as months of lead time |
| monthlyConsumptionLookBackPeriod | number (12) | The number of months to look back when calculating average monthly consumption (AMC) |
| monthlyConsumptionEnforceLookBackPeriod | true or false | if True, then the full lookbackup period will be used, even if there is no consumption in those periods. We don't recommend this, but it's here to comply with the rules in some countries |

Other preferences

You can set other preferences for mobile in the Store preferences by going to **Special > Show Stores**, Double-click on store **> Preferences tab**) in mSupply desktop:

| | | | | Ec | lit store | | |
|-------------------------------|-------------------|---------------------|---------------|------------|-------------------|-------------------------|--------------------------------------------|
| eneral Warehouse | | | | | | | |
| | General | Preferences | Logo | Visibility | Synchronisation | Custom fields | Master lists |
| | Store prefer | ence | | Status | | | |
| Confirm Supplier Invoices v | | | | 1 1 | | | |
| Goods received lines must | | | | 1 8 | | | |
| Locations must be entered | | hand | | | | | |
| Able to specify manufactur | | | ting for item | | | | |
| Show item unit column whi | | ng, ordernig or que | ang ior nem | | | | |
| Log transaction edit | in this ing | | | - H | | | |
| Set pack to one for all visib | le items in this | store | | 1 N | | | |
| Use remote authorisation f | | | | - H | | | |
| Use remote authorisation f | | | | 1 N | Custom Dat | 1 | |
| Use remote authorisation fi | | | | Ň | Monthly cons | umption look back p | eriod 0 |
| Use remote authorisation f | or supplier invo | ices | | l ñ | Months lead | time | 0 |
| Can manually link requisiti | on to supplier in | nvoice | | l õ | | | |
| Automatically populate sup | ply quantities w | with requested quar | tities | ĬŎ | _ | | |
| Show extra fields on requis | itions | | | i ă | | | |
| Show comment field when | entering suppli- | er invoice lines | | | When finalis | ing a Goods Receipt | |
| Consolidate batches | | | | Ō | The second second | ing a doour necespi | |
| Edit prescribed quantity on | prescription | | | | 💿 Don't re | ceive goods into stoc | k until Supplier Invoice is taken off hold |
| mobile: Enforce look back ; | period | | | | Receive | goods into stock, and | leave Supplier Invoice confirmed |
| mobile: Uses Vaccine Modu | le | | | | | - | |
| mobile: Uses Dashboard M | odule | | | | Receive | goods into stock, and | finalise Supplier Invoice immediately |
| mobile: Uses Cash Register | Module | | | | | | |
| mobile: Uses Payment Mod | ule | | | | For stock tra | insfers, the Supplier I | nvoice in the receiving store should be: |
| mobile: Uses Patient Types | | | | | Finalised | | On hold |
| mobile: Uses Hide Snapsho | t Column | | | | | | United State |
| | | | | | OK & Pre | vious OK 8 | Next Cancel OK |

Here are the preferences and what they do:

| Preference | Description |
|-----------------------------------|--------------------------|
| mobile: Enforce lookback period | Information coming soon! |
| mobile: Uses vaccine module | Information coming soon! |
| mobile: Uses dispensary module | Information coming soon! |
| mobile: Uses dashboard module | Information coming soon! |
| mobile: Uses cash register module | Information coming soon! |
| mobile: Uses Payment module | Information coming soon! |
| mobile: Uses patient types | Information coming soon! |
| mobile: Uses Hide Snapshot column | Information coming soon! |

Other configurations that then affect how mobile behaves

| Item | Description |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Programs | If you have a master list configured as a program, in mobile you will then be able to perform stock takes or supplier requisitions by program. |
| Reasons | If you have BOTH positive and negative inventory adjustments, have to apply a reason to stocktake lines with a difference != 0 |
| Prescription Categories | If you have transaction categories with type of "prescription" mobile will display a drop down list of prescription categories to select from |
| Insurance Providers | If you configured an insurance provider, then mobile will give you the ability to choose a policy, and to edit and create them at the end of a prescription |
| Payment Types | If you have configured any payment types, they'll show up in a list at the end of a prescription |

Dispensary mode

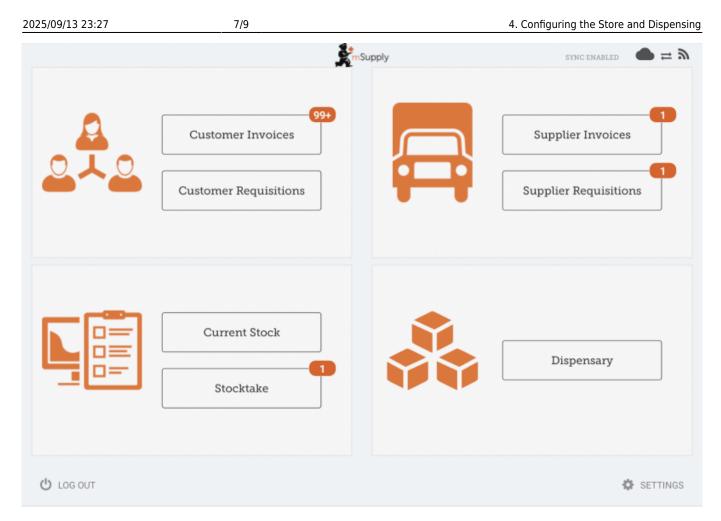
1. Ensure that your store is a Dispensary by choosing **Dispensary** from the drop-down list on the **General** tab of the store preferences.

| | | | | | New store | | | | |
|-------------------|------------|---------|-------------|---------|-------------------|--------------------|--------------|--------|----|
| Demo store | | | | | | | | | |
| | | General | Preferences | Logo | Synchronisation | Custom fields | Master lists | | |
| Store code | Demo1 | disp | ensary | 0 | | | | | |
| | Demo store | anabi | | | | Disable this store | | | |
| Organization name | | | | _ | | | | | |
| Address line 1 | | | | | Responsible offic | ter none | ۵ | | |
| Address line 2 | | | | | | | | | |
| Address line 3 | | | | | | | | | |
| Address line 4 | | | | | | | | | |
| Address line 5 | | | | | | | | | |
| Postal/Zip Code | | | | | | | | | |
| Phone | | | | | | | | | |
| Tags | | | | | | | | | |
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| | | | | | | | | Cancel | ОК |
| | | | | | | | | Convol | UN |

2. The mobile store needs to have the following field in Custom Fields for the dispensary to be visible in mobile

| | | | | New store | | | | |
|-----------------|-------------|------------------|------|-----------------|---------------|--------------|--------|----|
| | General | Preferences | Logo | Synchronisation | Custom fields | Master lists | | |
| - | - | | | | | | | |
| New line | Delete line | e(s) Id label | | | Field valu | e | | |
| usesDispensaryM | | | | true | | | | |
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| | | | | | | | Cancel | ОК |
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Of course you will need to synchronise mSupply mobile with the server before the mobile device receives these configuration settings. After sync, your Navigator window will look like this



When the Payments module is on

The cost and sell price are visible on supplier invoices:

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| AE18123 VITAMINE A 100 000 UI capa 20 09/2020 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 | Invoice 5 | | | <u>k</u> | Supply | | | FIN | ALISE 🤇 |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-------------|------------------------|----------|-------------|---------|---------------|------------|---------|
| ITEM CODE ITEM NAME GUANTITY EXPIRY GOST PRICE SELL PRICE REMO ADD1090 PLUMPY NUT much 92g carton/ISO 150 09/2019 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 | | 27/6/2019 | Their Ref: | nsfer | - | / | | | |
| ADD1090 PLUMPY NUT such 92g carton/150 150 09/2019 0.00 0.00 0.00 0.00 C | Q Search by | r item name | | | | | | New | bern |
| AE18123 VITAMINE A 100 000 UI caps 20 09/2020 0.00 0.00 0.00 | ITEM CODE | ITEM NAM | I. | • | QUANTITY \$ | EXPIRY | COST PRICE | SELL PRICE | REMOV |
| | A201090 | PLUMPYN | UT sach 92g carton/150 | | 150 | 09/2015 | 0.00 | 0.00 | 0 |
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| | AE18124 | VITAMINE | A 200 000 UT caps | | 150 | 12/2019 | 0.00 | 0.00 | 0 |
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The cost and sell price are visible when doing stocktakes:

| Comment | | | | | - | | |
|--------------|----------------|----------------|--------|----------------------|-------------|--------------|-----------|
| ITEM NAME | ABACAVIR / LAI | AIVUDINE 60/30 | MG CP | Add Ba | | | Add Batch |
| BATCH NAME | COST PRICE | SELL PRICE | EXPIRY | SNAPSHOT QUANTITY | ACTUAL \$ | DIFFERENCE 🜲 | REASON |
| stocktake_21 | 10.00 | 10.00 | | 56 | Not Counted | N/A | N/A |
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Previous: **3. Create the Store** | | Next: **5. Setting up the Users to access the store**

Default value is in italics - this is used if preference is not configured

From:

https://wiki.msupply.foundation/ - mSupply Foundation Documentation

Permanent link: https://wiki.msupply.foundation/en:mobile:setup:server_side:config?rev=1589846691

Last update: 2020/05/19 00:04

