



# User Guide - mSupply Mobile

## Stocktakes (General)

mSupply Mobile will automatically keep track of your stock levels for you, as you receive stock and give it out.

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**.

With mSupply Mobile, you can easily do a stocktake for:

- The **full inventory**; or
- A **limited range of items** (such as all your anti-malarials); or
- A **single item** (if you notice that the quantity on your shelves is wrong)

### Stocktakes

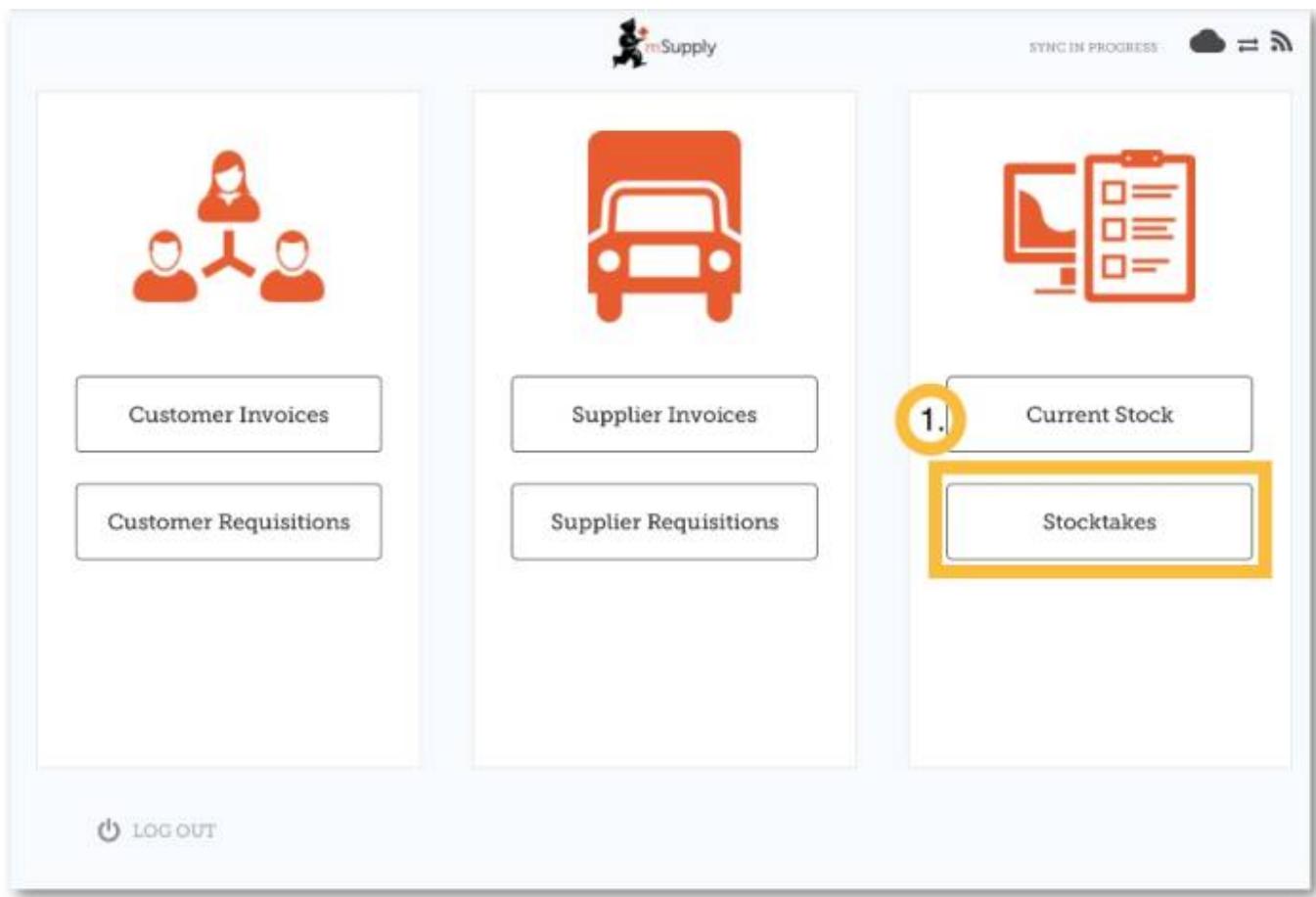
You should already be doing stocktakes with your current ordering systems.

Stocktakes are a very important way to ensure that the orders we are placing are accurate and that the stock will be correct if anyone checks!

Ideally, you should be doing a physical stocktake of each item **EVERY** time you place a main order but this depends on your local policies and procedures (and it may not be possible in larger facilities).

Let's learn how to do a stocktake... Using mSupply Mobile makes doing stocktake a lot easier than before!

## Click on Stocktakes



This brings up a list of all your previous stocktakes.

The description of each stocktake will be shown, with its **Date** and **Status**.

There are two stocktake statuses: **In Progress** (current) and **Finalised** (past).

An **In Progress** stocktake is one you are still working on. If you want to keep working on an In Progress stocktake, double click on it.

### In Progress stocktakes

**In Progress** stocktakes are the stocktakes you are still working on and haven't finalised.



We **strongly** recommend only having one In Progress stocktake at any time. This will prevent mistakes when moving between them.

**Finalise or delete old stocktakes before starting new**



Let's start a new stocktake now...

## Click on New Stocktake

A screenshot of the mSupply mobile application interface. At the top, there is a navigation bar with a back arrow, the text 'Stocktakes', and the mSupply logo. To the right of the logo is a circular icon with the number '2.' and a 'SYNC ENABLED' status. Below the navigation bar is a toolbar with two buttons: 'Current' (highlighted in orange) and 'Past'. The main area is a table with the following columns: NAME, CREATED DATE, STATUS, and DELETE. The table lists eight stocktake entries, all of which are in the 'In Progress' status and were created on 'Thu Aug 11 2016'. The last row of the table is highlighted in light blue. In the bottom right corner of the screen, there is a large orange button with the text 'New StockTake'.

## Select the items you wish to count

Select items by highlighting them in the far right **Selected** column. It's possible to tap selected items to remove previously selected items.

11:50 AM 30%  SYNC ENABLED   

Manage Stocktake

Search by item name or item code

Hide Stockouts All Items Selected

CODE	NAME	SELECTED
030063	Acetylsalicylic Acid 100mg tabs	<input checked="" type="checkbox"/>
030062	Acetylsalicylic Acid 300mg tabs	<input type="checkbox"/>
030453	Amoxicillin 250mg tabs	<input type="checkbox"/>
050457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/100ml	<input type="checkbox"/>
201116	Bandage W.O.W. 15cm wide x 5m roll	<input type="checkbox"/>
047288	Benzyl penicillin Injection 1000000 Unit	<input type="checkbox"/>
047290	Benzyl penicillin Injection 500.0000 Unit ( 300 mg )	<input type="checkbox"/>
031661	Captopril scored 25mg tabs	<input type="checkbox"/>
042304	Cloxacillin Sodium Injection Powder Vial/500mg	<input type="checkbox"/>
COV1	COVID19 Vaccine AstraZeneca	<input type="checkbox"/>
07_9898	DPT Vaccine	<input type="checkbox"/>
088882	Ibuprofen 200mg tablets	<input type="checkbox"/>

Stocktake Name:  Confirm

If you want to include every item or most items, click **All Items Selected**.

11:53 AM 29%  SYNC ENABLED   

Manage Stocktake

Search by item name or item code

Hide Stockouts All Items Selected

CODE	NAME	SELECTED
030063	Acetylsalicylic Acid 100mg tabs	<input checked="" type="checkbox"/>
030062	Acetylsalicylic Acid 300mg tabs	<input checked="" type="checkbox"/>
030453	Amoxicillin 250mg tabs	<input checked="" type="checkbox"/>
050457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/100ml	<input checked="" type="checkbox"/>
201116	Bandage W.O.W. 15cm wide x 5m roll	<input checked="" type="checkbox"/>
047288	Benzyl penicillin Injection 1000000 Unit	<input checked="" type="checkbox"/>
047290	Benzyl penicillin Injection 500.0000 Unit ( 300 mg )	<input checked="" type="checkbox"/>
031661	Captopril scored 25mg tabs	<input checked="" type="checkbox"/>
042304	Cloxacillin Sodium Injection Powder Vial/500mg	<input checked="" type="checkbox"/>
COV1	COVID19 Vaccine AstraZeneca	<input checked="" type="checkbox"/>
07_9898	DPT Vaccine	<input checked="" type="checkbox"/>
088882	Ibuprofen 200mg tablets	<input checked="" type="checkbox"/>

Stocktake Name:  Confirm

To hide items with 0 stock, select the 'Hide Stockouts' toggle.

CODE	NAME	SELECTED
037020	Paracetamol 500mg tabs	<input checked="" type="checkbox"/>
030063	Acetylsalicylic Acid 100mg tabs	<input checked="" type="checkbox"/>
088882	Ibuprofen 200mg tablets	<input checked="" type="checkbox"/>
COV1	COVID19 Vaccine AstraZeneca	<input checked="" type="checkbox"/>
038423	Salbutamol scored 2mg tabs	<input checked="" type="checkbox"/>
testt v	test v	<input checked="" type="checkbox"/>
050457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/100ml	<input checked="" type="checkbox"/>
test	test	<input checked="" type="checkbox"/>
030062	Acetylsalicylic Acid 300mg tabs	<input checked="" type="checkbox"/>

## Give your stocktake a logical name

For example, 'April Full Stocktake'.

Then click **Create**.

ITEM CODE	ITEM NAME	SELECTED
03_0061	Acetylsalicylic Acid double scored 500mg tabs	<input checked="" type="checkbox"/>
04_0084	Adrenaline HCL (Epinephrine) Injection 1mg/ml Amp/1ml	<input checked="" type="checkbox"/>
03_0200	Albendazole scored 400mg tabs	<input checked="" type="checkbox"/>
03_0280	Aluminium Hydroxide 500mg tabs	<input checked="" type="checkbox"/>
03_0452	Amoxicillin 500mg tabs	<input checked="" type="checkbox"/>
05_0457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/60ml	<input checked="" type="checkbox"/>
04_0505	Ampicillin Injection Powder Vial/1gm	<input checked="" type="checkbox"/>
04_0654	Artemether Injection 80mg/ml Amp/1ml	<input checked="" type="checkbox"/>
03_0630	Artemether/Lumefantrine 20mg/120mg (>35 kg) tabs 6x4	<input checked="" type="checkbox"/>
03_0651	Artemether/Lumefantrine 20mg/120mg (15-25 kg) tabs 6x2	<input checked="" type="checkbox"/>
03_0632	Artemether/Lumefantrine 20mg/120mg (25-35kg) tabs 6x3	<input checked="" type="checkbox"/>

## This will bring up the Stocktake Editor

This lists each item (including **Item Code**, **Item Name** and **Unit** as set up in [mSupply Desktop](#)), its **Snapshot Quantity** and its **Actual Quantity** (from the physical count).

The **Snapshot Quantity** is what the system THINKS you have. If it is correct (when compared with your physical count), you don't need to do anything!

The **Actual Quantity** is what you have actually counted. You can change this by clicking in that column and typing in the correct quantity.

Note that **Quantity** in mSupply mobile currently refers to the actual quantity of an item (i.e. the number of units) and not the number of packs.

### For each item, compare your physical count with the Snapshot Quantity

Update incorrect item quantities by clicking in the **Actual Quantity** column.

If you change the amount of stock you have in the Actual Quantity column, this variation will now show in in the **Difference** column.

This can take some time but remember - if the **Snapshot Quantity** is correct, you don't need to do anything!

ITEM CODE	ITEM NAME	UNIT	SNAPSHOT QUANTITY	ACTUAL QUANTITY	DIFFERENCE
030063	Acetylsalicylic Acid 100mg tabs	Tablet	6000	5000	-1000
030062	Acetylsalicylic Acid 300mg tabs	Tablet	3500	Not Counted	N/A
030453	Amoxicillin 250mg tabs	Tab	8000	7800	-200
030457	Amoxicillin Dry Powder for Suspension 125mg/5ml Bot/100ml	Bottle	500	490	-10
201116	Bandage W.O.W. 15cm wide x 5m roll	Roll	300	Not Counted	N/A

### If prompted, enter a reason for inventory adjustments

If your stocktake screen shows a **Reason** column, you must enter a reason for any positive or negative inventory adjustments.

As of v5.0.0 of mSupply mobile, the reason column is only displayed for stocktake batches and will not appear on the stocktake screen



**Options** must be enabled for **Stocktake Line Adjustments** on the mSupply desktop server and synced to mSupply Mobile to enable reasons for inventory adjustments.

If the **Actual Quantity** entered is different from the **Snapshot Quantity**, you will be prompted to select a **Reason** for the **Difference** from a standard list. You will not be able to continue until a reason is selected.



Stocktake

Stocktake Name: February 3rd - 2019

Comment:

FINALISE

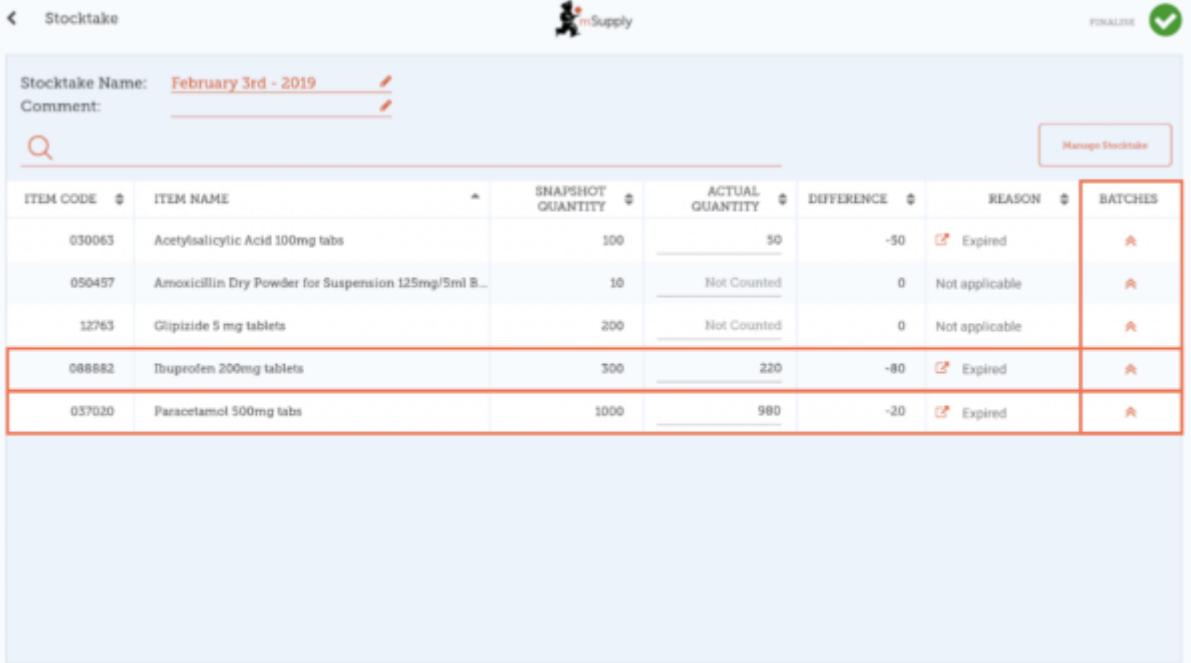
Manage Stocktake

ITEM CODE	ITEM NAME	SNAPSHOT QUANTITY	ACTUAL QUANTITY	DIFFERENCE	REASON	BATCHES
030063	Acetylsalicylic Acid 100mg tabs	100	50	-50	<input checked="" type="checkbox"/> Expired	
050457	Amoxicillin Dry Powder for Suspension 125mg/5ml B...	10	Not Counted	0	Not applicable	
12763	Glipizide 5 mg tablets	200	Not Counted	0	Not applicable	
088882	Ibuprofen 200mg tablets	300	220	-80	<input checked="" type="checkbox"/> Expired	
037020	Paracetamol 500mg tabs	1000	980	-20	<input checked="" type="checkbox"/> Expired	

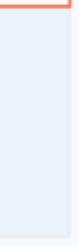
To change the reason, click on the cell again.

## Edit batch-specific information

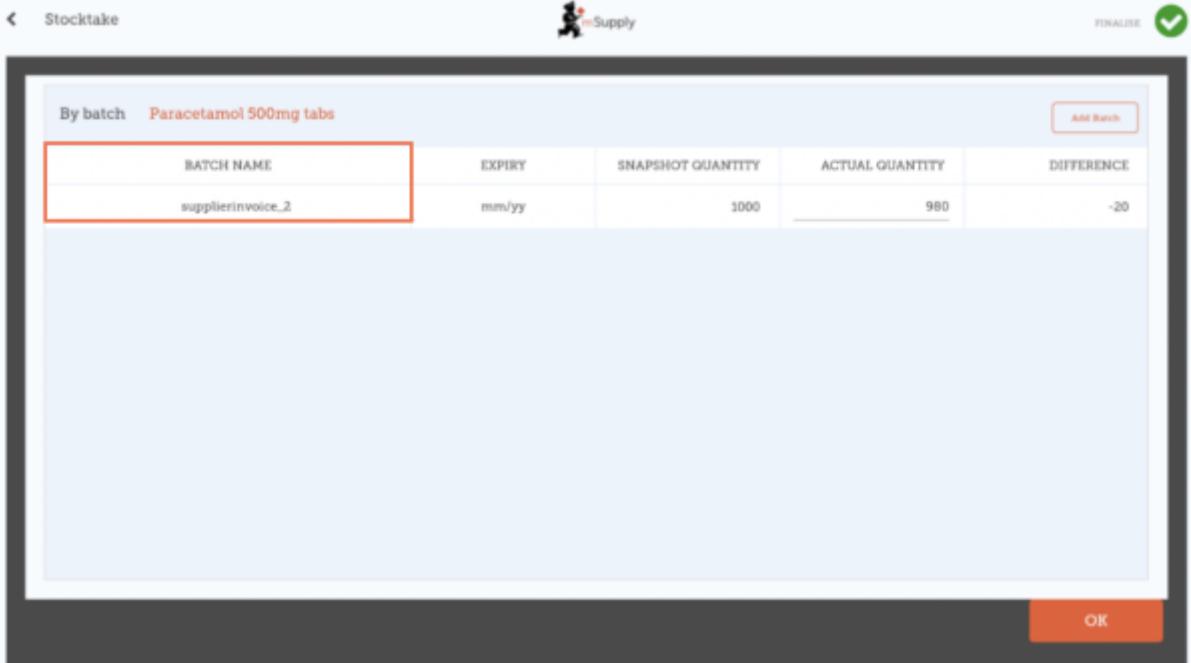
You can adjust batch-specific information or add new batches by clicking the item's **Batches** icon.



The screenshot shows a stocktake interface with a table of items. The table has columns: Item Code, Item Name, Snapshot Quantity, Actual Quantity, Difference, Reason, and Batches. The 'Batches' column contains a red icon. The data is as follows:

ITEM CODE	ITEM NAME	SNAPSHOT QUANTITY	ACTUAL QUANTITY	DIFFERENCE	REASON	BATCHES
030063	Acetylsalicylic Acid 100mg tabs	100	50	-50	Expired	
050457	Amoxicillin Dry Powder for Suspension 125mg/5ml B...	10	Not Counted	0	Not applicable	
12763	Glipizide 5 mg tablets	200	Not Counted	0	Not applicable	
088882	Ibuprofen 200mg tablets	300	220	-80	Expired	
037020	Paracetamol 500mg tabs	1000	980	-20	Expired	

In this example there is only one batch of paracetamol.



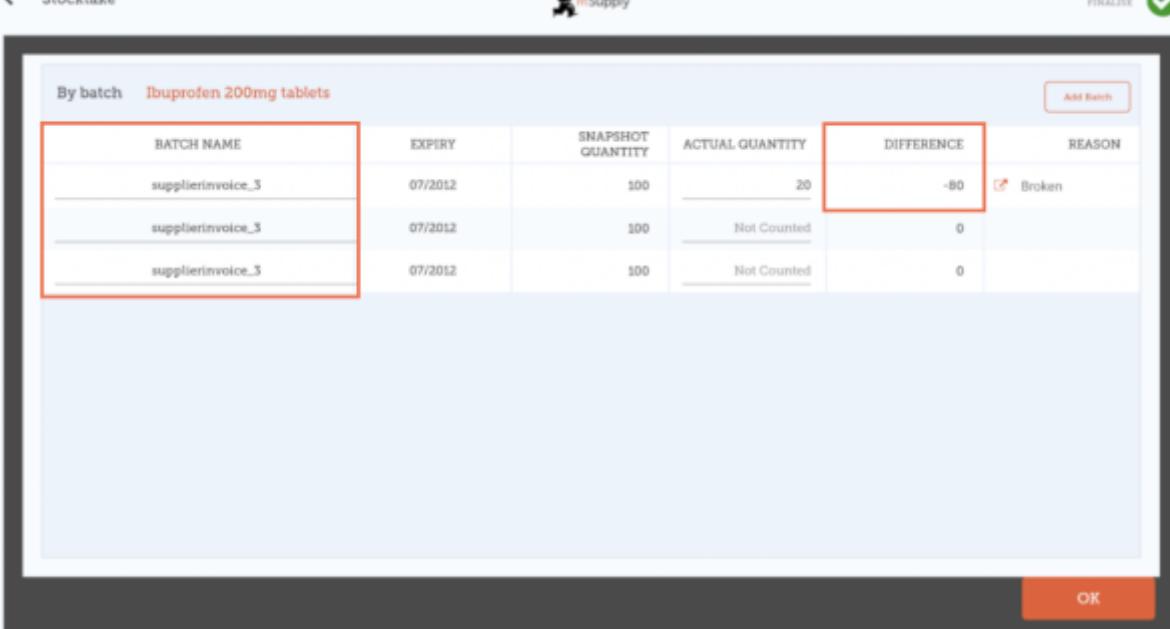
The screenshot shows a modal dialog for adjusting a single batch. The title is 'By batch Paracetamol 500mg tabs'. The table has columns: Batch Name, Expiry, Snapshot Quantity, Actual Quantity, and Difference. The 'Batch Name' column is highlighted with a red border. The data is as follows:

BATCH NAME	EXPIRY	SNAPSHOT QUANTITY	ACTUAL QUANTITY	DIFFERENCE
supplierinvoice_2	mm/yy	1000	980	-20

At the bottom right is an 'OK' button.

If there are multiple batches:

- **Inventory adjustments will be automatically made to the batch that arrived first (i.e. first in - first out).**
  - In this example there are three batches of ibuprofen. The **Snapshot Quantity** was 300 and the **Actual Quantity** was 220. The **Difference** of 80 was automatically taken away from the batch that arrived first. However, this can be manually changed in this screen.

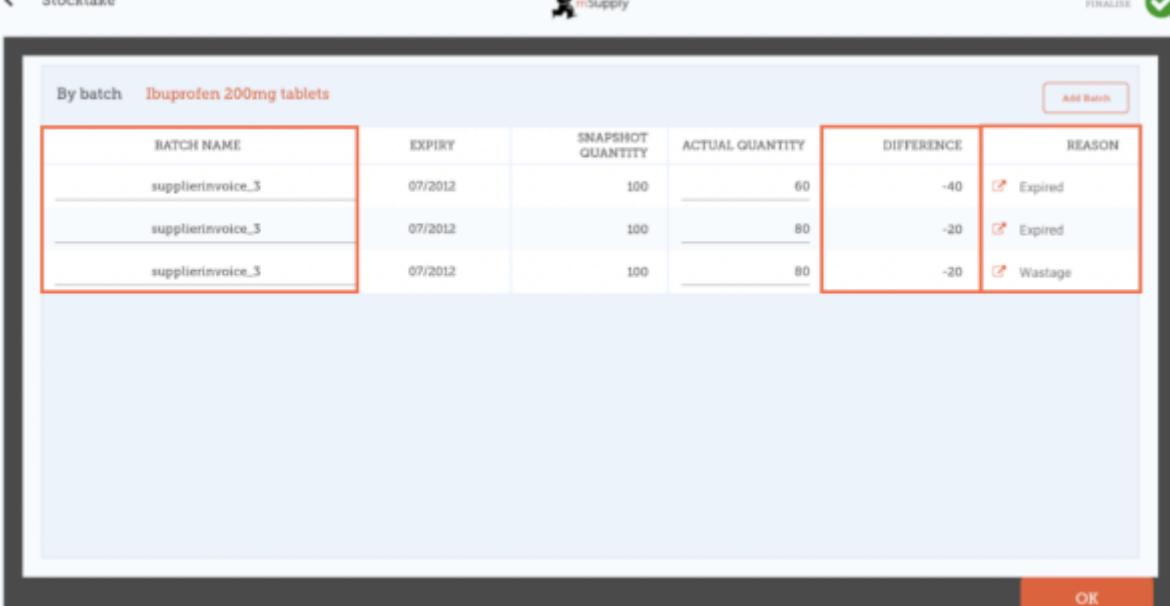


By batch Ibuprofen 200mg tablets		EXPIRY	SNAPSHOT QUANTITY	ACTUAL QUANTITY	DIFFERENCE	REASON
BATCH NAME						
supplierinvoice_3	07/2012	100	20	-80	<span style="color: red;">☒</span> Broken	
supplierinvoice_3	07/2012	100	Not Counted	0	<span style="color: red;">☒</span>	
supplierinvoice_3	07/2012	100	Not Counted	0	<span style="color: red;">☒</span>	

**OK**

- **The inventory adjustment reason selected will automatically apply to all batches.**

- However, separate reasons for different batches can be manually changed in this screen. In this example we have updated the inventory adjustment of 80 among the batches of ibuprofen, with separate reasons for each batch.



By batch Ibuprofen 200mg tablets		EXPIRY	SNAPSHOT QUANTITY	ACTUAL QUANTITY	DIFFERENCE	REASON
BATCH NAME						
supplierinvoice_3	07/2012	100	60	-40	<span style="color: red;">☒</span> Expired	
supplierinvoice_3	07/2012	100	80	-20	<span style="color: red;">☒</span> Expired	
supplierinvoice_3	07/2012	100	80	-20	<span style="color: red;">☒</span> Wastage	

**OK**

When you are finished making changes in the **Batches** screen, click **OK**.

Note: The main stocktake screen will only show the most common reason among the batches for an item's inventory adjustment.

## When you are finished...

Click **Finalise**.



This will update all your stock levels to match the quantities you have entered in the **Actual Quantity** column.

Like always with mSupply Mobile, you don't need to be connected to the internet to do this - the information will sync in the background when internet becomes available.

[Previous: Current Stock](#) | | [Next: Stocktakes \(Program\)](#)

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