



# User Guide - mSupply Mobile

## 8. 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

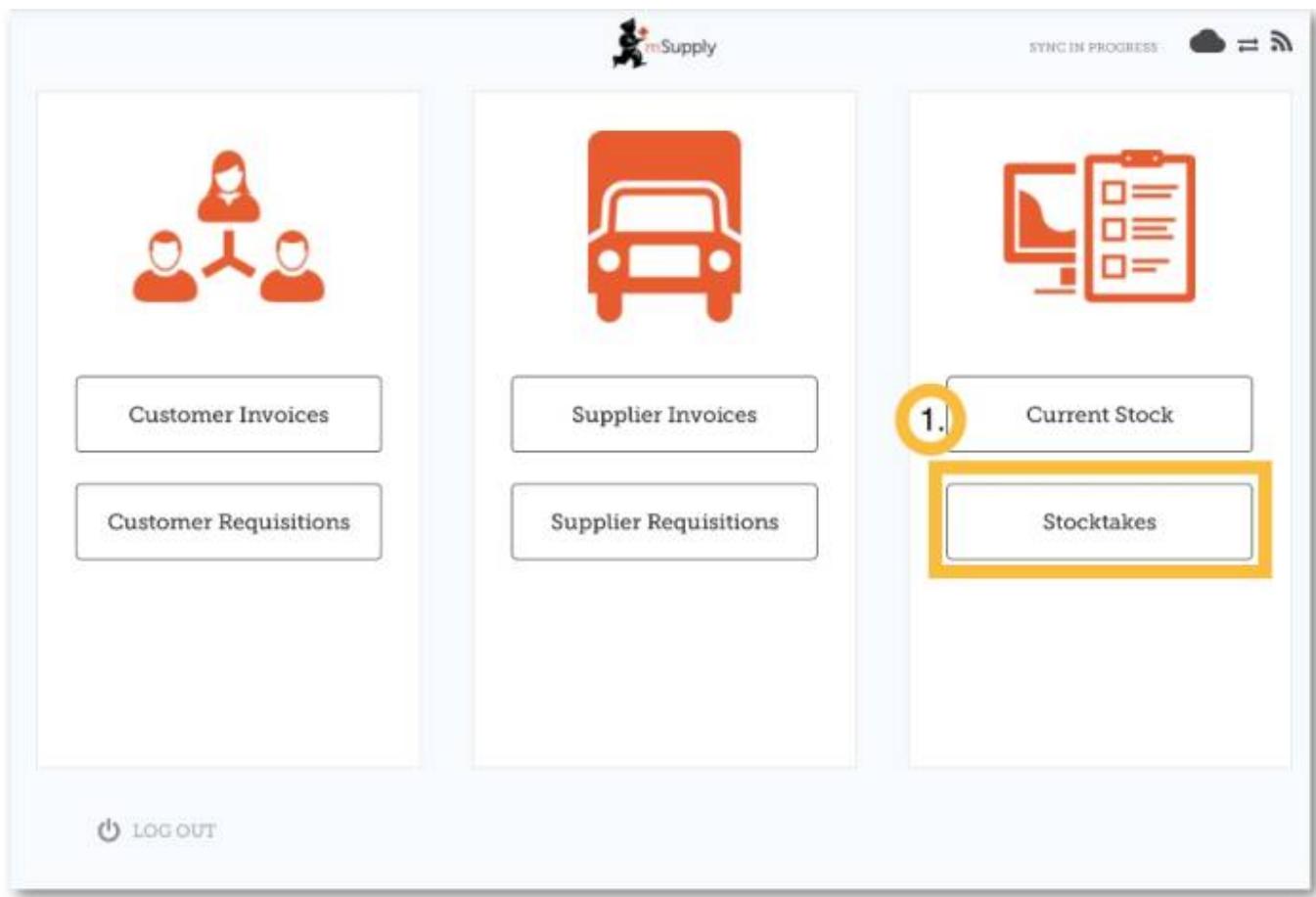
You should already be doing stocktakes with your current ordering systems.

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!

## 1. 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...

## 2. Click on New Stocktake

A screenshot of the mSupply mobile application interface. The top navigation bar shows 'Stocktakes' and the mSupply logo. On the right, there are connectivity icons (4G, Wi-Fi, battery) and a circled '2'. Below the navigation is a toolbar with 'Current' and 'Past' buttons, and a large orange button labeled 'New StockTake' which is highlighted with a yellow box and a circled '2'. The main area is a table listing stocktake entries. The columns are 'NAME', 'CREATED DATE', 'STATUS', and 'DELETE'. The entries are: 'Stocktake 11/8/2016 14:21' (Thu Aug 11 2016, In Progress), 'Stocktake 11/8/2016 14:20' (Thu Aug 11 2016, In Progress), 'April full stocktake take' (Thu Aug 11 2016, In Progress), 'may full stocktake' (Thu Aug 11 2016, In Progress), 'June full stocktake take' (Thu Aug 11 2016, In Progress), 'July full stocktake' (Thu Aug 11 2016, In Progress), and 'august full stocktake' (Thu Aug 11 2016, In Progress). Each entry has a 'DELETE' button on the far right.

## 3. Select the items you wish to count

Select items by highlighting them in the far right **Selected** column.

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

## 4. Give your stocktake a logical name

For example, 'April Full Stocktake'.

Then click **Create**.

The screenshot shows a list of items for a new stocktake. The items are listed in a table with columns for Item Code and Item Name. Each item has a 'SELECTED' checkbox in the last column. A yellow circle labeled '3.' is drawn around the sync icon in the top right corner. A yellow circle labeled '4.' is drawn around the 'Create' button at the bottom right of the list.

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

Give your stocktake a name  Create

## 5. This will bring up the Stocktake Editor

This lists each item, 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!

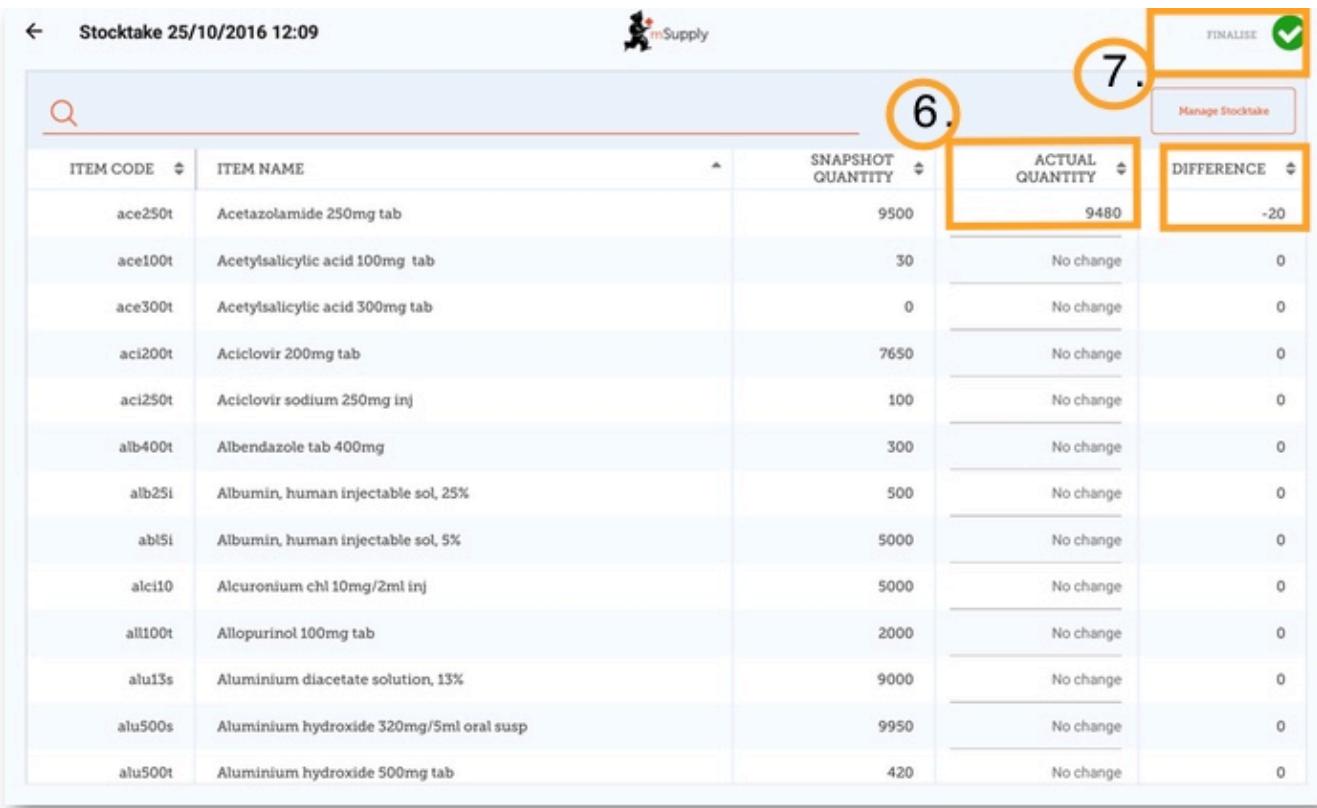
The **Actual Quantity** is what you have actually counted. You can change this by clicking in that column and typing in the correct quantity.

## 6. 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                               | SNAPSHOT QUANTITY | ACTUAL QUANTITY | DIFFERENCE |
|-----------|---|-------------------|-----------------|------------|
| ace250t   | Acetazolamide 250mg tab                 | 9500              | 9480            | -20        |
| ace100t   | Acetylsalicylic acid 100mg tab          | 30                | No change       | 0          |
| ace300t   | Acetylsalicylic acid 300mg tab          | 0                 | No change       | 0          |
| aci200t   | Aciclovir 200mg tab                     | 7650              | No change       | 0          |
| aci250t   | Aciclovir sodium 250mg inj              | 100               | No change       | 0          |
| alb400t   | Albendazole tab 400mg                   | 300               | No change       | 0          |
| alb25i    | Albumin, human injectable sol, 25%      | 500               | No change       | 0          |
| abl5i     | Albumin, human injectable sol, 5%       | 5000              | No change       | 0          |
| alci10    | Alcuronium chl 10mg/2ml inj             | 5000              | No change       | 0          |
| all100t   | Allopurinol 100mg tab                   | 2000              | No change       | 0          |
| alu13s    | Aluminium diacetate solution, 13%       | 9000              | No change       | 0          |
| alu500s   | Aluminium hydroxide 320mg/5ml oral susp | 9950              | No change       | 0          |
| alu500t   | Aluminium hydroxide 500mg tab           | 420               | No change       | 0          |

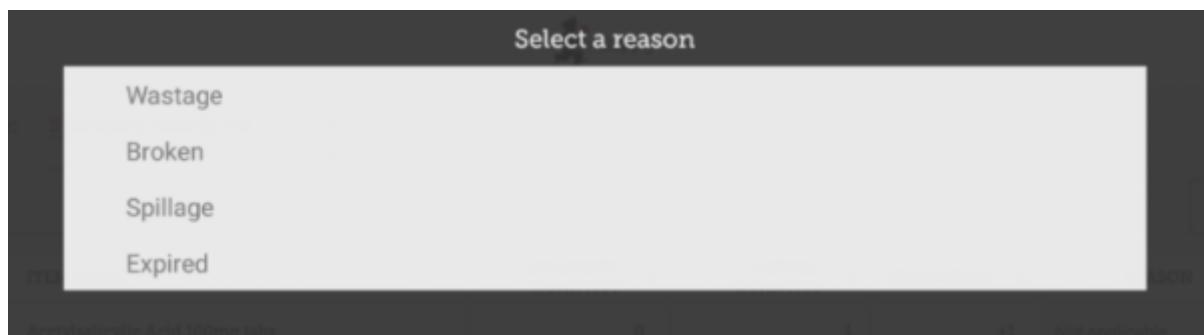
## 7. If prompted, enter a reason for inventory adjustments

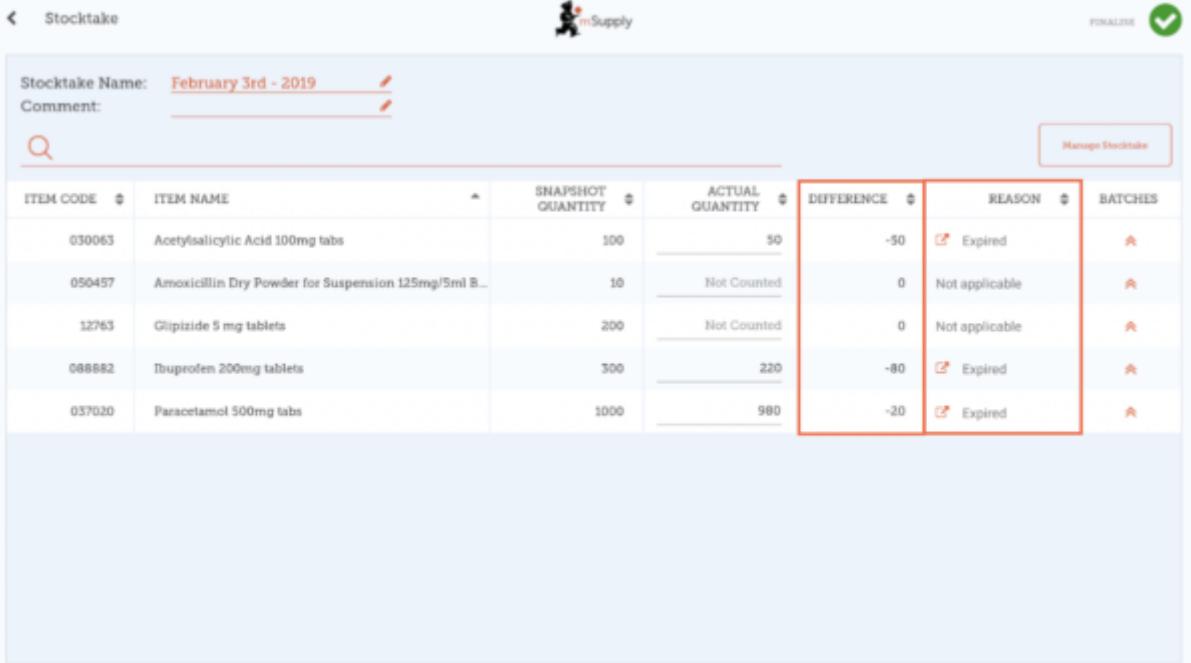
If your stocktake screen shows a **Reason** column, you must enter a reason for any positive or negative inventory adjustments.



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

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.



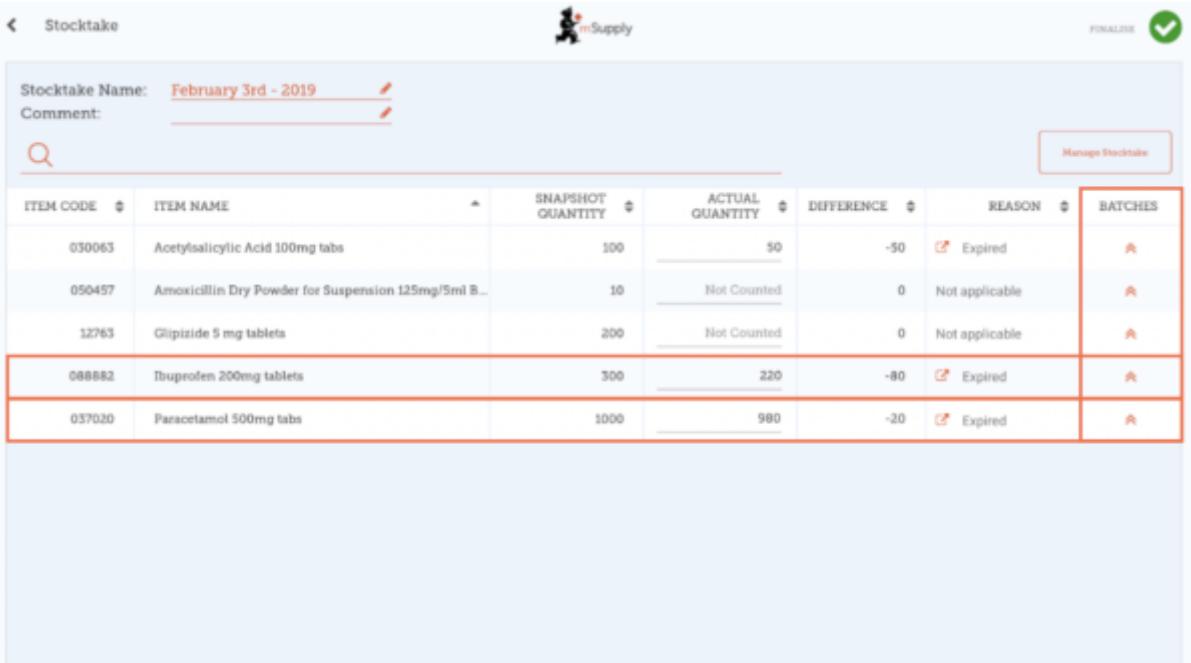


| ITEM CODE | ITEM NAME  | SNAPSHOT QUANTITY | ACTUAL QUANTITY | DIFFERENCE | REASON         | BATCHES |
|-----------|--|-------------------|-----------------|------------|----------------|---------|
| 030063    | Acetylsalicylic Acid 100mg tabs                      | 100               | 50              | -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        |         |

To change the reason, click on the cell again.

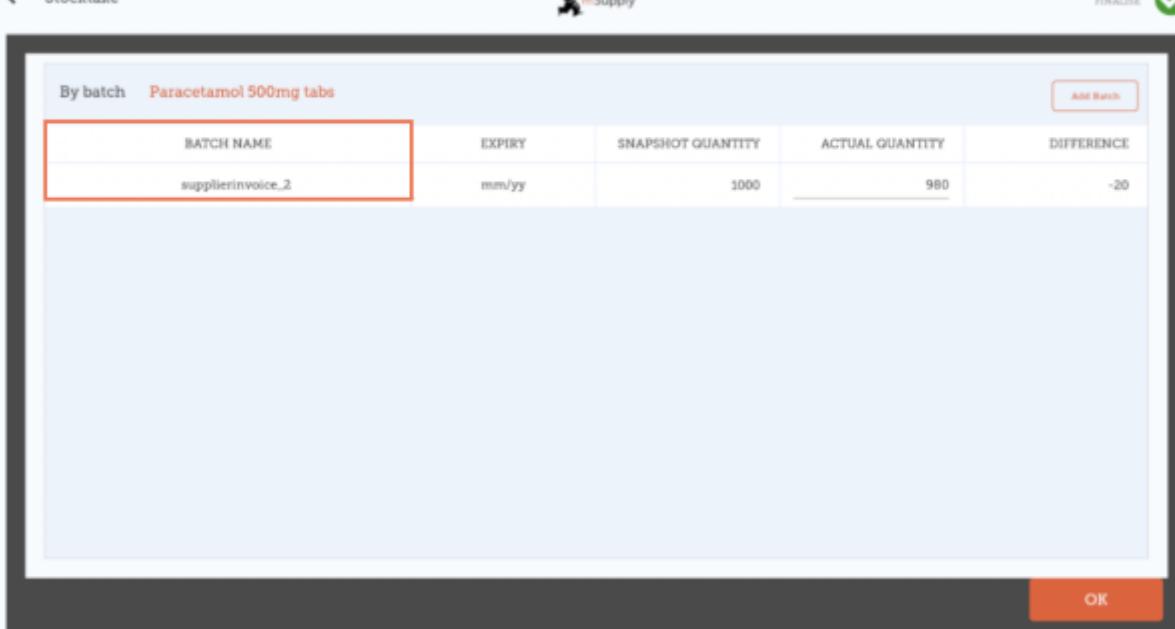
## 8. Edit batch-specific information

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



| 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.

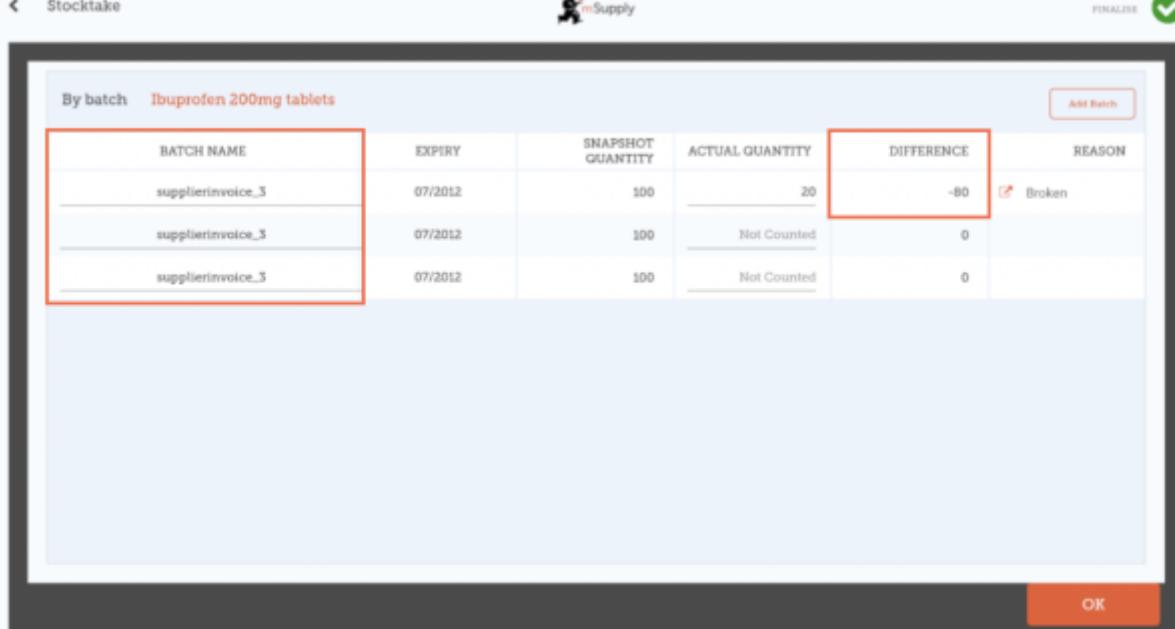


The screenshot shows a stocktake interface for Paracetamol 500mg tabs. A single batch named 'supplierinvoice\_2' is listed. The batch has an expiry date of 'mm/yy' and a snapshot quantity of 1000. The actual quantity is 980, resulting in a difference of -20. The 'OK' button is visible at the bottom right.

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

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.



The screenshot shows a stocktake interface for Ibuprofen 200mg tablets. Three batches, all named 'supplierinvoice\_3', are listed. Each batch has an expiry date of '07/2012', a snapshot quantity of 100, and an actual quantity of 20. The difference for each batch is -80. A reason 'Broken' is selected for the first batch. The 'OK' button is visible at the bottom right.

| BATCH NAME        | EXPIRY  | SNAPSHOT QUANTITY | ACTUAL QUANTITY | DIFFERENCE | REASON |
|-------------------|---------|-------------------|-----------------|------------|--------|
| supplierinvoice_3 | 07/2012 | 100               | 20              | -80        | Broken |
| supplierinvoice_3 | 07/2012 | 100               | Not Counted     | 0          |        |
| supplierinvoice_3 | 07/2012 | 100               | Not Counted     | 0          |        |

- **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 |         |                   |                 |            |         |
|----------------------------------|---------|-------------------|-----------------|------------|---------|
| BATCH NAME                       | EXPIRY  | SNAPSHOT QUANTITY | ACTUAL QUANTITY | DIFFERENCE | REASON  |
| supplierinvoice_3                | 07/2012 | 100               | 60              | -40        | Expired |
| supplierinvoice_3                | 07/2012 | 100               | 80              | -20        | Expired |
| supplierinvoice_3                | 07/2012 | 100               | 80              | -20        | Wastage |

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.

## 9. 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.

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