

~~SLIDESHOW~~

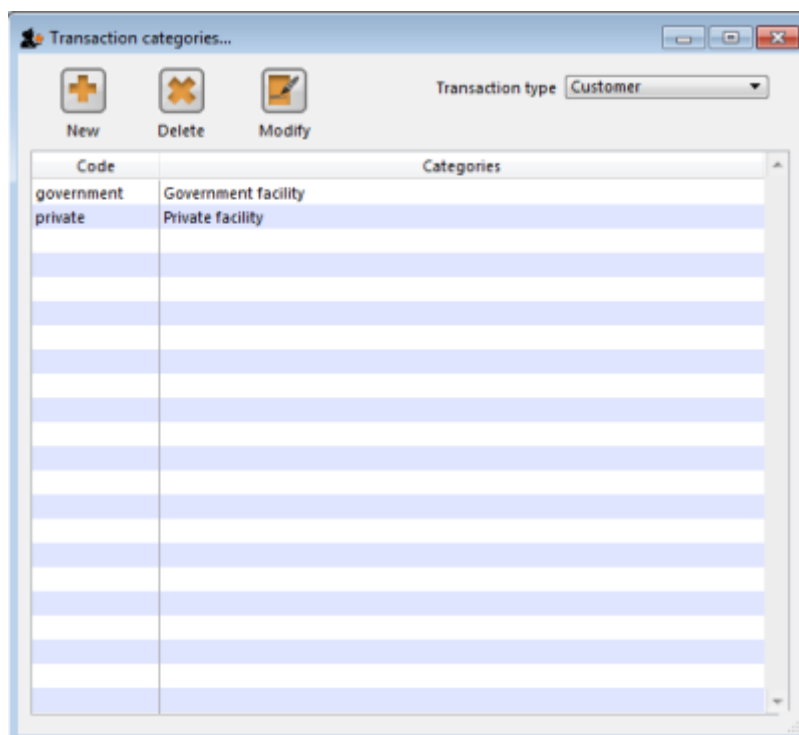
How to report by invoice category

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Within mSupply if you have categorised invoices (or transactions) in a particular manner then you will be able to run reports based on this category. In dispensary mode Prescriptions can also be categorised. For example you may be required to tag your customer invoices as “Government” or “Private” facilities.

Follow these steps to generate a report by invoice category :-

- Make sure there is at least one transaction category available in your data file. If not, then follow the instructions at http://docs.msupply.org.nz/other_stuff:transaction_categories to create a transaction category.



For this example the image above shows the addition of two categories for customer invoices.

- On your Invoices window, all of your categories will be displayed under the “Category” drop-down list.

L	Location	Item Name	Qty	Pack Size	Batch	Exp date	Sell Price	Price extn
1	C21	Abacavir sulfate (ABC) 300mg Tabs	30	60	1062375	01/10/2011	14.49	144.90
2	H33	Dapsone 120mg, Oval 120mg tabs	1	100	144	11/01/2011	9.32	9.32
3	Expire Roo	Gimm's Solution, 500ml/bottle	10	1	V0810026	01/09/2011	4.00	40.00

- Choose the category from the list and click on the OK button. For reporting purposes, the invoice will need to be confirmed.
- For reporting, from mSupply menu or Navigator , View Report → Transactions.

- On the right hand side of that window, you will see the section “Transaction filter”. Here we have chosen to search for “Code” contains “govern”, which is equivalent to searching for “Code” equals “Government”. Click on the OK button and you will now have the opportunity to view items issued to government facilities.

Report Preview

Print | Refresh | Filter | Search

Sales, Confirmed date : 09/04/2012 to 09/04/2012, Store : General Medic (Sth Transaction category : Code contains @government).

Item	Supplier	Code	Date	Invoice	IPacks	Pack Size	Total Qty	Cost Price	Net Price	Price Difference
Salbutamol Inhaler 200mcg / 5ml	Accord Healthcare Ltd	811	09/04/12	811	10.00	60.00	600	11.20	10.20	1.00
Total									144.00	
Salbutamol Inhaler 200mcg / 5ml	Accord Healthcare Ltd	811	09/04/12	811	1.00	120.00	120	8.00	8.00	0.00
Total									9.00	
Salbutamol Inhaler 200mcg / 5ml	Accord Healthcare Ltd	811	09/04/12	811	10.00	1.00	10	4.00	4.00	0.00
Total									40.00	
Grand Total									193.00	

Previous: [How to correct wrong pack sizes](#) You have reached the end of the mSupply User Guide

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Permanent link:
https://docs.msupply.org.nz/faq:how_to_report_by_invoice_category?rev=1344018352

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