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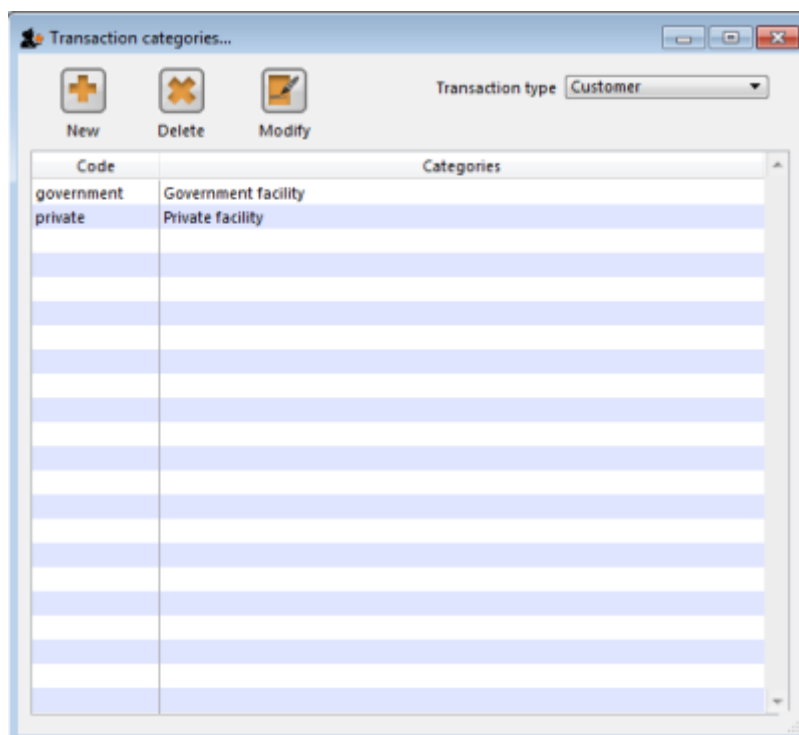
How to report by invoice category

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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.

Customer Invoice

Name: Arubari Mini Health post Confirm date: 00/00/00 Colour: Black

Invoice: 510 Entry date: 09/04/2012 Goods receive ID: 0 Status: inv Entered by: sussol Store: General

Category: Government facility

L	Location	Item Name	Unit	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	H53	Dapsone 120mg, Oval 120mg tabs	1	100	144	11/01/2011	9.32	9.32
3	Expire Roo	Gimm's Solution, 500ml/bottle	30	1	V0810026	01/09/2011	4.00	40.00

Other charges: Amount: 0.00

Subtotal: 194.22
0 % tax: 0.00
Total: 194.22

Buttons: Hold, Finalize, Export batch: 0, OK & Next, Delete, OK

- 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.

Transaction report

Type of report: Report

- Each invoice grouped by name
- Each invoice grouped by date
- Each invoice line by item
- Each invoice showing profit
- Each invoice line grouped by item department then item
- Each invoice line grouped by name
- Totals for each item category
- Totals for each item
- Totals for each item-Net Inventory Adjustment
- Totals for each name
- Totals for each item broken down by name
- Totals for each name broken down by item
- Totals for each item department
- Totals for each item grouped by day
- Totals for each item grouped by month

Date range: Confirmed Date Shipping Date

From: 09/04/2012 To: 09/04/2012 Today

Donated by: equals

Which mode? Both modes Store mode Dispensary mode

Exclude transfers from calculations ☒

Exclude Ad hoc and non stock items ☒

Exclude hidden items ☒

Open report in Excel ☐

Transaction type: Sales to customers Sales to and credits from customers Purchases from suppliers Purchases from and credits to suppliers Inventory adjustment - Add stock Inventory adjustment - Reduce stock Inventory adjustment - Net movement

Transaction filter: Code contains govern

Name filter: Name code equals

and Category Don't care

Prescriber filter: Code equals

Item filter: Item code equals

and category is Don't Care

and department is Don't care

Buttons: Cancel, OK

- 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.

