

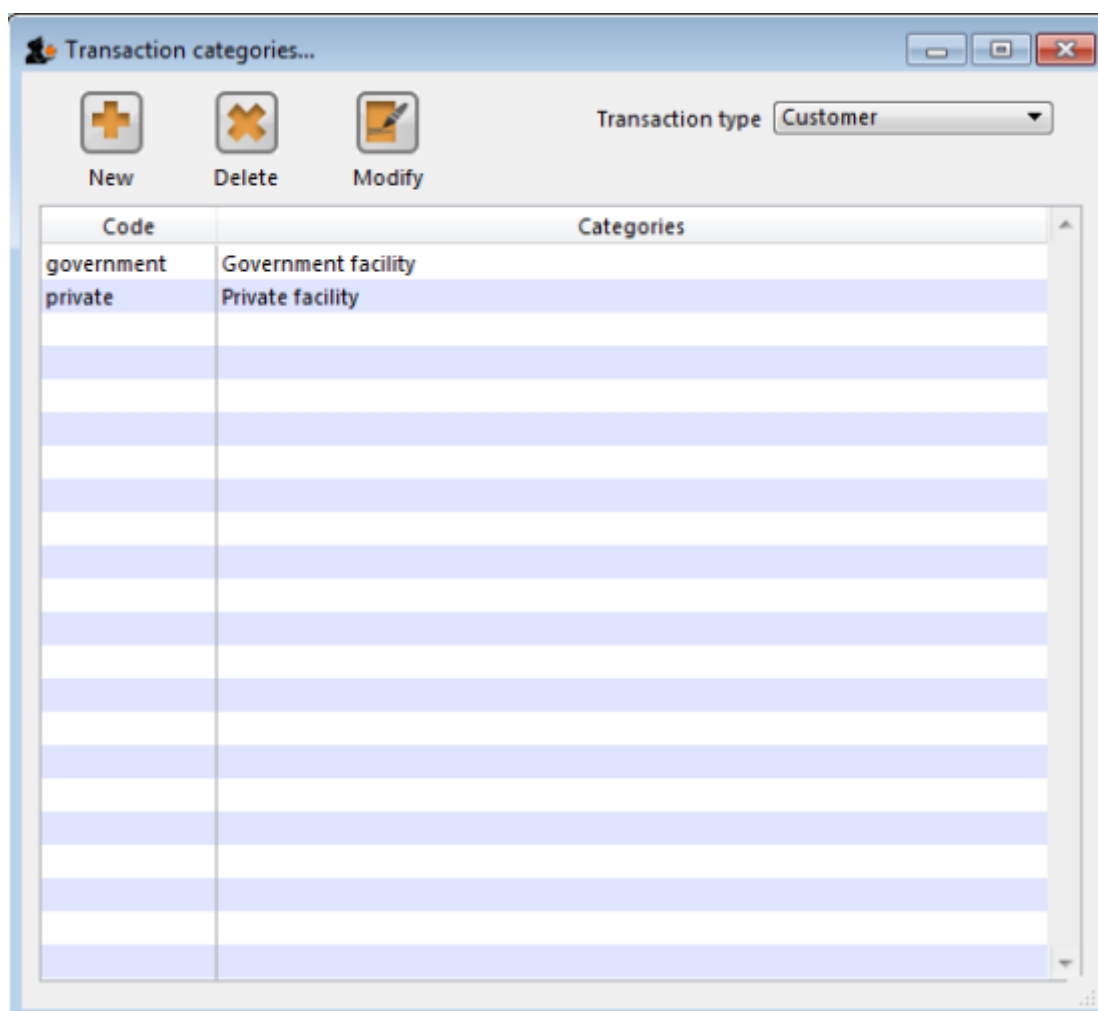
## How to report by invoice category

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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](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.

2014/05/24 20:20 faq:how\_to\_report\_by\_invoice\_category [https://docs.msupply.org.nz/faq:how\\_to\\_report\\_by\\_invoice\\_category?rev=1400962842](https://docs.msupply.org.nz/faq:how_to_report_by_invoice_category?rev=1400962842)

- 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

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

Open report in Excel

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.

Print Preview

Sales, Confirm date : 09/04/2012 to 09/04/2012, Store : General Mode: Both Transaction category : Code contains @govern@

Item	To/From	Code	Date	Invoice	#Packs	Pack Size	Total Quant	Cost Price	Sell Price	Price Extension
Axodin sulfate / ABCI 300mg, Tabs	Axodin 1010 Health post	axu	09-04-12	810	10.00	80.00	800	14.49	14.49	114.90
Total										114.90
Exacrine 100mg, Oral/100mg tabs	Axodin 1010 Health post	axu	09-04-12	810	1.00	100.00	100	8.32	8.32	8.32
Total										8.32
Gemvars solution 800mcg/ml	Axodin 1010 Health post	axu	09-04-12	810	10.00	1.00	10	4.00	4.00	40.00
Total										40.00
Grand Total										164.22

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## You have reached the end of the mSupply User Guide

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